windream web portal

User Guide

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windream web portal pro

Welcome

The present description is a guideline for the handling of **win**dream web portal pro. The description presents a brief survey on the program functions.

A detailed description and additional background information can be found under the respective topic of the **win**dream user manual.

Introduction to windream web portal pro

windream web portal pro represents an internet-based interface for the Document Management System **win**dream and allows to access the DMS via the Internet or an Intranet with a common Browser. The system supports for example Microsoft Internet Explorer (version 4.0 or higher), Netscape Navigator (version 7 or higher) and Opera (version 6.05 or higher).

A survey

windream web portal pro offers access to the document storage of **win**dream via user authentication at logon.

windream web portal pro allows to find and view documents and their system properties or DMS-specific properties. It is also possible to make documents available on a workstation Computer by downloading them from the Internet.

On the other hand, documents can also be imported into the DMS via upload, or checked out documents can be checked in again after having edited them externally. Additionally, the system allows to modify objects including their system or DMS-specific properties. File operations like copying, moving or deleting objects can be executed as well.

windream web portal pro does not require any additional **win**dream component on the workstation Computer.

Basic requirements for access to the DMS

Each user must be provided with a valid operating system account, over which he logs on to **win**dream web portal pro in order to get access to the DMS and the documents stored in it.

A further requirement is that users must have been classified as **win**dream users in the user and group administration, and they must be

equipped with the necessary rights. The user and group administration integrated in the **win**dream Management Console (WMC) offers a function for determining specific rights for the access to **win**dream web portal pro. The system differentiates between the following access modes:

- Read-only
  A user can only retrieve documents with **win**dream web portal pro. Documents can be retrieved, read and downloaded on a local data carrier. It is not possible to edit objects from the DMS or to import files via upload to **win**dream.

- Full access
  Users can use all functions without limits. Documents can be retrieved, viewed or downloaded. Additionally, documents can for example be checked out for and checked in after external editing. It is also possible to upload documents into the DMS and to change or delete them.

Note: The number of users who can access the DMS via **win**dream web portal pro depends on the number of available licences. Additionally, there is a differentiation between full access and read-only. Users provided with full access licences can additionally switch to the retrieval mode via an option of the configuration module of **win**dream web portal pro (read-only mode).

A detailed description and additional information on the administration of users and groups in the WMC can be found under the respective topics of the **win**dream user manual.

After having logged on successfully, **win**dream web portal pro will offer the functions for getting access to the **win**dream DMS on its start-up page.

Logon to windream web portal pro

In order to launch **win**dream web portal pro, you will have to start your Webbrowser. Then, you enter the URL of the Webserver over which you can log on to the **win**dream DMS.

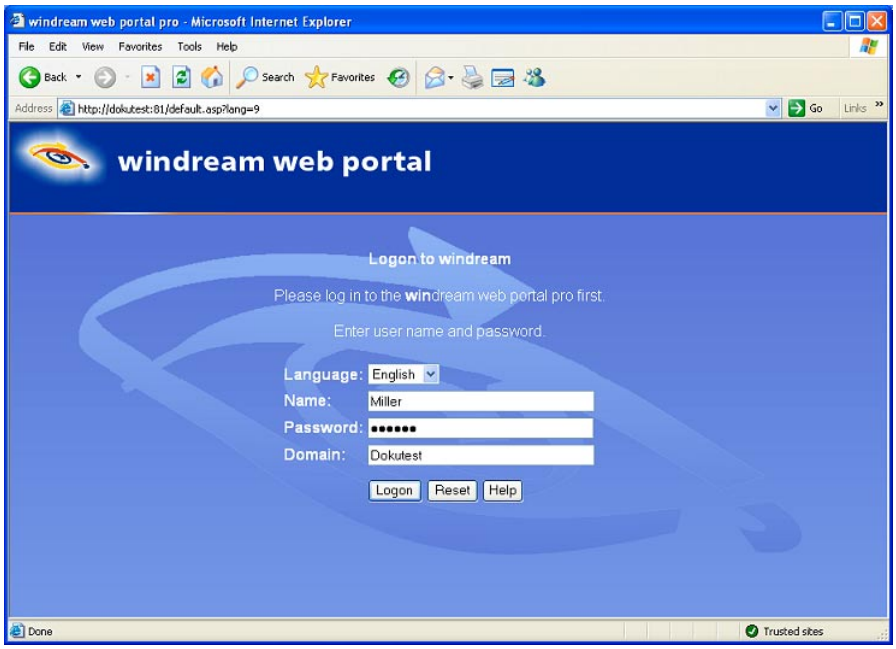

Figure 1: Logon to the **win**dream Server

When logging on to **win**dream, you enter the user ID (*Name* and *Password*) on the start page, under which you also log on to your workstation Computer. Enter the domain designator in the respective field, which you also use when logging in to your workstation. Then, you select the desired language version and enable the *Logon* command button.

Enable the respective button to discard entries and to reset the field contents of the logon form, if you do not want to log on or if you want to select another account.

Try logon once again or logon with another user ID

If you want to log on once again or with another ID, you will have to call the logon form again using icon *Logout* . Enter the desired user data and enable command button *Logon*.

Log out

Click icon to log out. For each user, specific system resources are occupied on the **win**dream Server during a session (for example the creation of a temporary upload and download directory), which will only be released again after logoff or when the time limit for the session has expired.

Session expired

Users are connected with the **win**dream Server when logging in to **win**dream. This connection will automatically be cut if there is no access to **win**dream within a preset period of time. The limit is determined by a system administrator. After the time has expired, a message will be displayed in the Browser, and you can log on again via link *Back to Logon*:

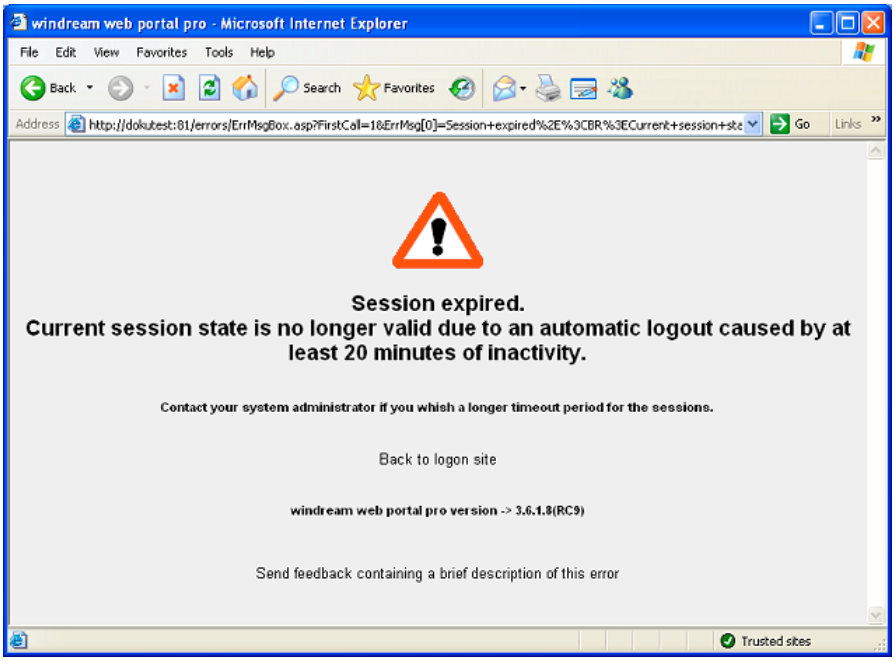
windream web portal pro - Microsoft Internet Explorer
File Edit View Favorites Tools Help
Back Search Favorites
Address http://dokutest:81/errors/ErrMsgBox.asp?FirstCall=1&ErrMsg[0]=Session+expired%2E%3CBR%3ECurrent+session+sta
Go Links
Session expired.
Current session state is no longer valid due to an automatic logout caused by at least 20 minutes of inactivity.
Contact your system administrator if you whish a longer timeout period for the sessions.
Back to logon site
windream web portal pro version -> 3.6.1.8(RC9)
Send feedback containing a brief description of this error
Trusted sites

Figure 2: Session expired

Navigation in windream web portal pro

After logon to **win**dream, the **win**dream drive respectively the site determined in the configuration of the start view will be displayed in the Explorer view. The different functions of **win**dream web portal pro are selected over the respective icons of the menu bar in the upper part of the browser window. Additional functions are executed via further icons which are displayed in certain contextual situations. The navigation bar can also be configured individually.

Figure 3: Navigation in **win**dream web portal pro – default settings

User-specific settings

Figure 4: Navigation bar without first menu line

windream.
Portal-Site | Configuration | Logout | Help
Search Functions | Create New | Process | Lock
Hierarchal Search | Simple Search | Quick Search | Index Search | Object Type Search | Refresh
– More functions –

Figure 5: Navigation bar – commands as hyperlinks

Functions for document retrieval

A click on this icon enables the Explorer view for the **win**dream drive.

A click on this icon will start the simple search.

This icon starts the quick search.

Call the index search of **win**dream web portal pro with this icon.

This icon starts the object type search via **win**dream web portal pro.

Refreshes the Explorer view.

This icon opens the upload directory.

A search from the currently selected search function is started over this icon.

The icon *New search* will discard the current search result, which means that the result list will be initialized. At the same time, all entries and selected index fields of the current search function will be reset in order to allow entering new items.

Functions for document editing

Imports a new file into the DMS.

Creates a new folder in the **win**dream drive.

Renames objects in the **win**dream drive.

This icon moves objects within the **win**dream drive.

This icon copies objects in the **win**dream drive.

Checks out documents to a selected local data carrier.

Checks in previously checked out documents.

This icon will undo a check-out process.

Creates a new version of a document in the **win**dream drive.

Deletes **win**dream objects.

Configuration, logon, logout, help

Opens the configuration of **win**dream web portal pro for personal settings.

This icon launches the logon / logout form of **win**dream web portal pro.

Starts the online help function of **win**dream web portal pro.

If the first line of the menu bar in the navigation bar is invisible, you switch between **win**dream web portal and the portal site via icon *Portal site* or *windream Web Client* .

Note: The available functions depend on the type of access (read-only / full access) of the logged-in user (see also chapter "A survey").

Notes on handling

The following chapter describes some special features in the handling and management of **win**dream web portal pro concerning the specific Web design of the application.

Selecting elements from dropdown lists

Depending on the context, you can apply contents from dropdown lists into input fields either

- via a link or
- via icon *Apply value*

Opening a dropdown list via a link and applying values

In order to apply an element from a dropdown list into an input field, you open the list with a click on the respective link (field designator of the assigned input field). Select the desired entry in the list to apply it into the input field. The assigned input field can be initialised by selecting the empty entry from a dropdown list.

Icon for applying a value

In order to apply an element from a dropdown list to an entry field, you have to open the list and highline the desired entry. Then, you apply the desired entry to the corresponding input field using icon *Apply value* . The corresponding input field can be initialized for a new entry by applying an empty dropdown list line.

The *Apply value* icon applies the selected entry of the dropdown list into the respective input field. The contents of the field will then be overwritten.

Entries in tables and charts

Input fields for indexing or for finding documents can also be tables. Tables are lists in which you can enter index information for objects or for creating search expressions line any line. Depending on the type of field, dropdown lists can be defined as an input help.

Adding lines

You can add a line via icon *Add* in the title bar of a list field. Enter the desired contents into the line or apply an entry from the list.

Adding several lines

If you have already added several lines and if you want to add more lines, highlight the desired number of lines (checkmark in column *Add*) and click icon . Now, the list will be extended by the respective number. The contents of previously selected lines will be applied as preselection.

Applying contents from dropdown lists or calendar

Icon at the beginning of a line indicates whether a dropdown list or the calendar function is available as input help. In this case, you open the list by clicking the icon. Select the desired entry in the list or in the calendar to apply it to the line.

Removing lines

In order to remove single lines and their contents from the list, you select the desired number of lines (checkmark in column *Delete*) and click . The lines will be removed from the list.

Selecting objects

For specific editing processes, you will have to select the respective objects from the lists before editing (for example from the Explorer listview or from a result list).

Single objects can be selected by enabling the checkmark in front of the entry in column *Filename*.

Enable the checkmark in the column header of the *Filename* column to select all entries of a list.

A folder can also be selected in the Explorer folder view by clicking the desired folder on the left side of the Explorer window.

Using hyperlinks

Specific links can be used as hyperlinks (external URLs). These are:

- links on filenames and folders (column Filename), the preview (column) and the download *Save as* / (column) in the Explorer listview and in the result lists.

These links can for example be placed on the Desktop via drag and drop, they can be copied to the clipboard as link, or they can be sent via e-mail.

In order to be able to execute actions via these hyperlinks, a user must be logged in to **win**dream via **win**dream web portal pro.

Send error messages and information to Support

If errors occur while working with **win**dream web portal pro, the system will display a respective message in a separate browser window.

You can get more details on the respective error by clicking the respective command button. This description can be sent to the windream support via e-mail. The link at the end of the message will start your mail application, and the error description will be attached to the e-mail message.

Note: Please note that the maximum number of characters in an e-mail message containing error reports is limited to 250 characters, if you use MS Internet Explorer and MS Outlook as e-mail Client. This problem is a specific property of the Microsoft Software. Messages exceeding the number of 250 characters must be copied in the browser window and must be inserted into the mail body manually.

Retrieving documents

The retrieval functions of the Webclient correspond to those of the **win**dream 3.6 Client software. A retrieval is exclusively executed within the **win**dream DMS. Documents can be found via the following search functions:

- Via the hierarchic document organisation in the document storage using the Explorer .
- Via structured document properties within the index properties or via free search items within the fulltexts of documents. These functions can be executed with the simple search , the quick search and with the index search as well.
- According to the document and folder types of documents/folders within the Object Type search .
- Via stored search profiles.

Standard search

If you start a search from one of the search functions without determining a search expression, **win**dream web portal pro will execute a standard search with which all available documents will be found.

Wildcards and logical links in search expressions

Wildcards can be used in the search. Complex queries can then be generated from the search conditions by logical links of search expressions.

Using search profiles

You can save search profiles and use them again for a new search.

Display of retrieval results in result lists

All search results are presented in result lists. Viewing and editing the documents found is executed with the connected original applications. You can also use viewers for displaying documents.

You select the documents for viewing or editing from the result list. You can download documents, edit them, and upload them to the DMS again.

Hierarchic search (Explorer)

With the hierarchic search, **win**dream web portal pro offers an opportunity to find documents by browsing in the **win**dream file storage. The search is then executed via the hierarchic document organisation in folder which are presented in the Windows Explorer. Only those folders and documents will be displayed that correspond to

the rights of a user.

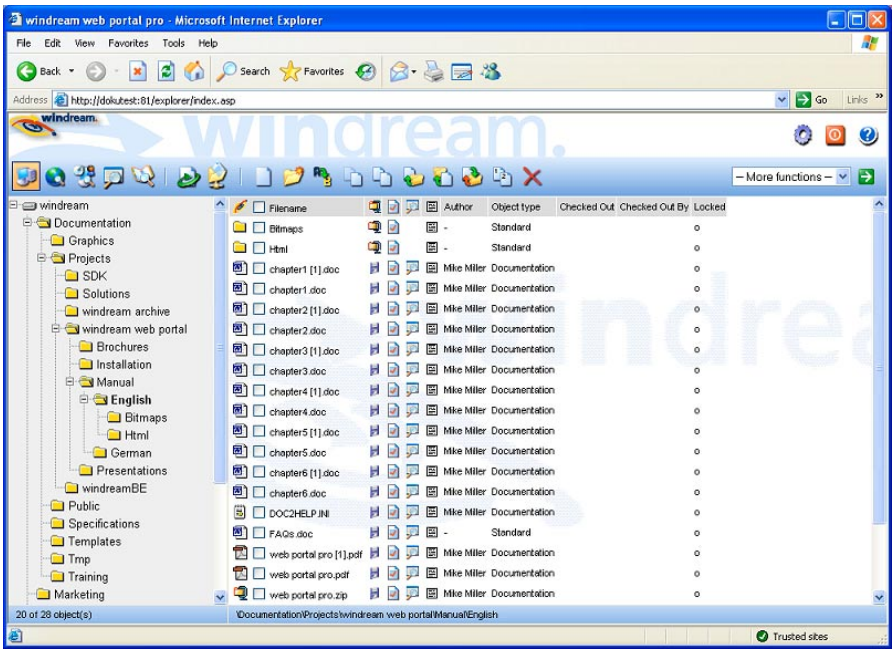

Figure 6: Hierarchic search

At first, the list view will only present the number of objects which have been determined in the configuration under option *Search options>Maximum blocksize for search*. If the number of documents found is bigger than the blocksize determined, you load the next block of objects into the list by clicking *next <n> hits*. All objects will be loaded after having clicked the respective button.

Viewing documents (download via filename)

A document can be opened for being viewed by clicking the entry in the listview. You can use the link to a document (column *Filename*) as hyperlink and place it on the Desktop with drag and drop. The document can be opened with a double click.

Local storage of documents (download via *Save as* icon)

You can store documents in a destination directory of a local data carrier. Single documents can be saved via icon , several selected documents or a folder is / are saved with icon (column). With a click on one of the icons or in the Explorer listview, you open the file-download window of the browser and download the selected objects.

There are different opportunities for downloading several objects at the same time. You either select the desired objects in the list and execute the download via icon in the headline of the column, or you select a folder and click icon in column .

If you select several objects for a download, these objects will first be compressed. The objects are then collected in a ZIP-file (default: `download.zip`) and are saved in the selected destination directory.

After having finished the download, you extract the objects from the ZIP-file. Documents will then be available for editing (for example viewing and editing in the original application, printing and distribution). However, it is not possible to edit or change the document properties like the index data outside the DMS.

Downloaded files can be imported into the DMS again via upload (see also chapter "Create new objects (upload)" page 46). However, this is only possible if you have a full access licence for **win**dream web portal pro, if you have the permission for full access and if you have the respective right for changing documents in the DMS (see also chapter "A survey", page 1).

Note: Please note that all documents and subfolders of a folder to be downloaded are collected in the download file. Downloading folders is executed recursively.

Different options for the download processes can be set in the configurations (see chapter "configurations", page 101).

Open folder

A folder can be opened with a click on the respective folder entry in the result list (column for opening a folder). The contents of the selected folder are displayed in a separate browser window. The link to a folder (column *Filename*) can be used as hyperlink and can thus be placed as hyperlink on the Desktop. The folder can then be opened with a double click.

Note: The column for opening a folder will only be displayed, if this option has been set in the configuration (see chapter "Configuration", p. 96).

View properties

Via the *Properties* icon of an entry in the list (column) you can view the document or folder properties of an object selected from the listview. The properties column will only be displayed, if this option has been set in the configuration.

Document preview

It is possible to open a document preview for certain filetypes in a browser window. The *preview* icon next to the entry in the listview indicates the filetypes for which a preview is available. In order to view a document, you click on icon of a list entry in column . The

preview column will only be displayed, if this option has been set in the configuration.

You can use the link on the preview of a document as hyperlink and place it with drag and drop on the Desktop. The document preview can then be opened from the Desktop with a double click.

Viewing fulltexts

Different fulltexts may exist for each document stored in windream. The following types of fulltext are considered:

- Extracted fulltext
- Manual fulltext
- Fulltext from fulltext-searchable index fields (fulltext-searchable stringfields) and
- Extended (private) fulltext.

The generation, acquisition and editing of the fulltexts is either executed automatically by the **win**dream services (**win**dream fulltext indexing service, **win**dream DMS-service) or manually via tab pages *Fulltext* and *Indices* in the file properties.

You can also find documents with **win**dream web portal pro by searching documents according to contained text elements. In this case, the search can either be conducted in the different fulltext types or in all fulltext types simultaneously.

Note: Fulltexts can also be generated for folders. This way, you can acquire and edit manual fulltext via tab page *Fulltext* of the folder properties. Contents which you enter during the editing of index criteria in fulltext-searchable index fields will be extracted and stored as fulltext. It is also possible to acquire and edit private fulltext in the respective fields while editing the index properties (on tab page *Indices*).
The display and the editing of different fulltexts is executed in the same way as for documents.

If the listview has been configured in a way that the fulltext column is displayed, the fulltext icon next to an entry in the listview will indicate for which files and documents a fulltext exists. For viewing, click icon of a list entry in column .

You can also view or edit fulltexts via icon *Properties* in column .

Refresh view

In order to refresh the Explorer view, click icon .

Changing the presentation of the listview

The type and the number of columns presented in the Explorer listview can be modified individually. The index properties to be viewed in the Explorer can be selected from the list of available columns (indices). In order to configure columns you switch to the configuration of **win**dream web portal pro by clicking icon (see chapter "Configuration", p. 96).

Changing list sorting

The sorting of the listview can be changed by clicking on the respective column header. The sorting is reversed by clicking the header once again.

Simple search

With the simple search, **win**dream web portal pro offers a search function for executing a simultaneous search with alpha-numeric expressions via index data and the fulltexts of documents.

Search items entered in field *Search for* are connected with operator "OR" by **win**dream. This will start a search for documents which at least contain one of the expressions in the fulltext. In order to find documents which contain all of the expressions entered, you can connect the items with "AND". For this, you enable the option to include all words. **win**dream extends the search expression and indicates *Search for* in this field. In order to make the extension visible, the option for viewing the extended fulltext search item must be switched on in the configuration (see chapter "Search options", p. 98).

Via icon , options for the current search can be edited.

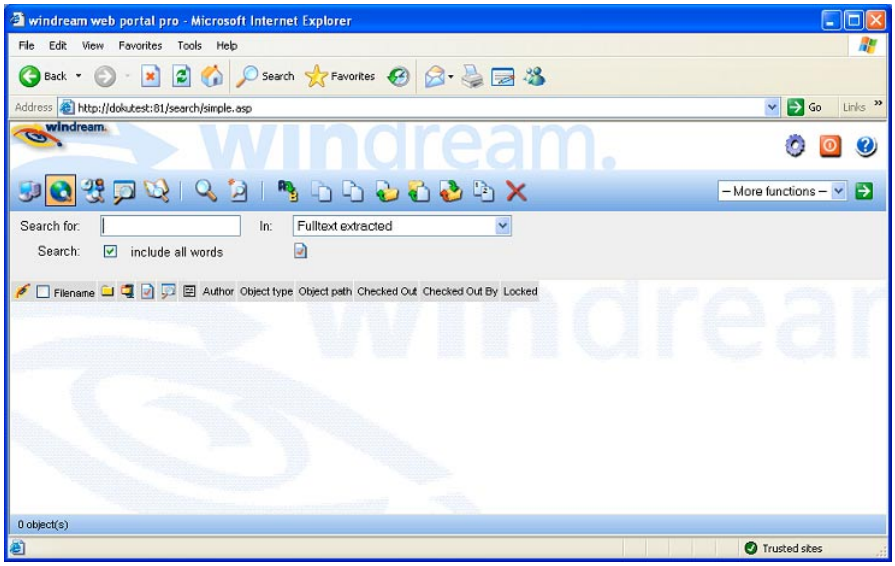

Figure 7: Simple search

How to conduct a simple search

1. Click icon of the simple search.
2. Enter the desired search expression in dropdown list *Search for* or apply an existing entry.
3. In the dropdown list named *In* you determine in which fulltext of the documents a search shall be conducted. In the configurations on the search options page, you can determine the entry to be preset as default.
4. Highlight the option to include all words, if the the search items entered shall be connected with "AND".
5. Determine the search options via icon or in the configurations on the search options page. This depends on the conditions which can be valid for the current search or for all searches (see chapter "Editing options of the current search", p. 15). E.g., enable the respective checkboxes, if previous versions shall also be considered or if a case-sensitive search shall be conducted (optional). If a search shall only be conducted from a specific folder, you determine the folder as starting point of the search.
6. Start the search via icon .

The documents and folders found are presented in the result list. The status bar of the list presents the number of objects found. At first, the number of objects presented here corresponds to the number determined in the configuration. You can load the next block of objects by clicking link *next <n> hits*, or you can change the number of objects presented by entering another number under *Maximum number of blocksize* in the search options.

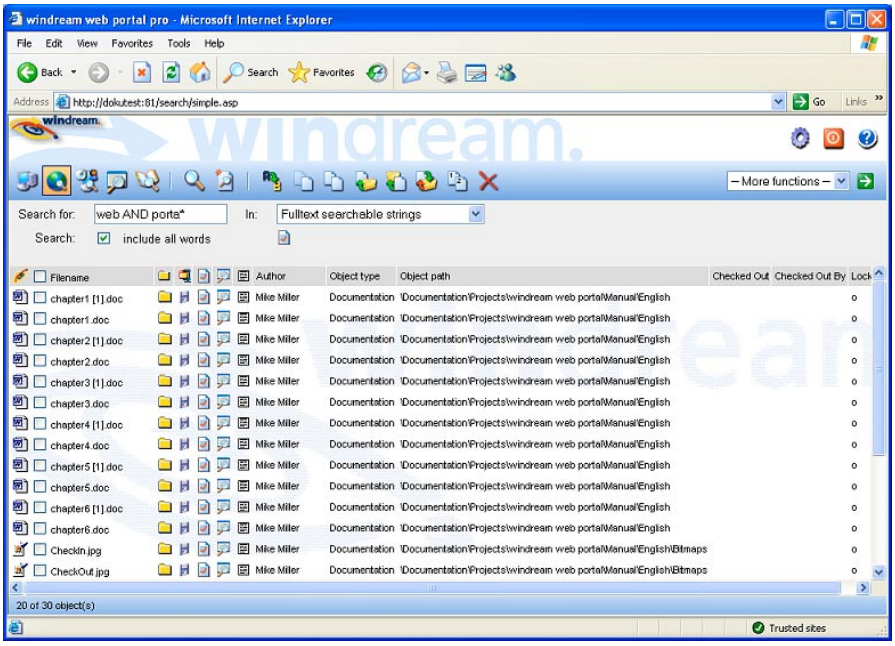
windream web portal pro - Microsoft Internet Explorer
File Edit View Favorites Tools Help
Back Search Favorites
Address http://dokutest:81/search/simple.asp
Go Links
windream.
– More functions –
Search for: web AND porta*
In: Fulltext searchable strings
Search: include all words
Filename Author Object type Object path Checked Out Checked Out By Lock
chapter1 [1].doc Mike Miller Documentation \Documentation\Projects\windream web portal\Manual\English
chapter1.doc Mike Miller Documentation \Documentation\Projects\windream web portal\Manual\English
chapter2 [1].doc Mike Miller Documentation \Documentation\Projects\windream web portal\Manual\English
chapter2.doc Mike Miller Documentation \Documentation\Projects\windream web portal\Manual\English
chapter3 [1].doc Mike Miller Documentation \Documentation\Projects\windream web portal\Manual\English
chapter3.doc Mike Miller Documentation \Documentation\Projects\windream web portal\Manual\English
chapter4 [1].doc Mike Miller Documentation \Documentation\Projects\windream web portal\Manual\English
chapter4.doc Mike Miller Documentation \Documentation\Projects\windream web portal\Manual\English
chapter5 [1].doc Mike Miller Documentation \Documentation\Projects\windream web portal\Manual\English
chapter5.doc Mike Miller Documentation \Documentation\Projects\windream web portal\Manual\English
chapter6 [1].doc Mike Miller Documentation \Documentation\Projects\windream web portal\Manual\English
chapter6.doc Mike Miller Documentation \Documentation\Projects\windream web portal\Manual\English
CheckIn.jpg Mike Miller Documentation \Documentation\Projects\windream web portal\Manual\English\Bitmaps
CheckOut.jpg Mike Miller Documentation \Documentation\Projects\windream web portal\Manual\English\Bitmaps
20 of 30 object(s)
Trusted sites

Figure 8: Conducting a simple search

Editing options of the current search

1. Click the icon for edting the options of the current search .

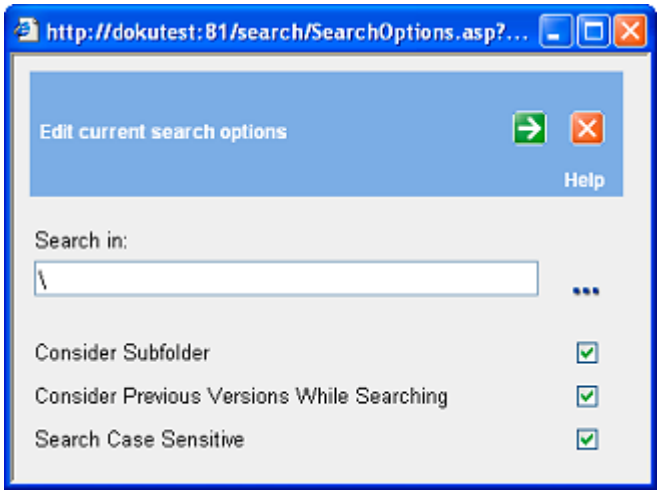

Figure 9: Editing the options for the current search

2. Determine the desired search options and save the settings by clicking . The respective options are described in chapter "Search options", p. 98.

The settings are only valid for the current search.

Quick search

An efficient search function with selected criteria is offered with the Quick search. Documents of a specific object type or a certain creator (author) can be found with this function. This function also allows a retrieval over date and time entries (for example date of creation or modification) and a simultaneous search with alpha-numeric expressions via index data and the fulltexts of documents.

The search criteria of the different groups named *Object Type*, *Search for*, *Creator* and *Time* are connected with operator "AND" by **win**dream. Single expressions within the groups (for example in field *Search for*) will be linked with "OR". For searches in the fulltexts, the search expressions entered can be connected with operator "AND" in the *Search for* field. Thus, you enable the option to include all words. **win**dream will extend the the search expression and will display it in the *Search for* field. In order to make the extension visible, the option for viewing the extended fulltext search term must have been switched on in the configurations (see chapter "Search options", p. 98).

Via icon , the options for the current search can be edited.

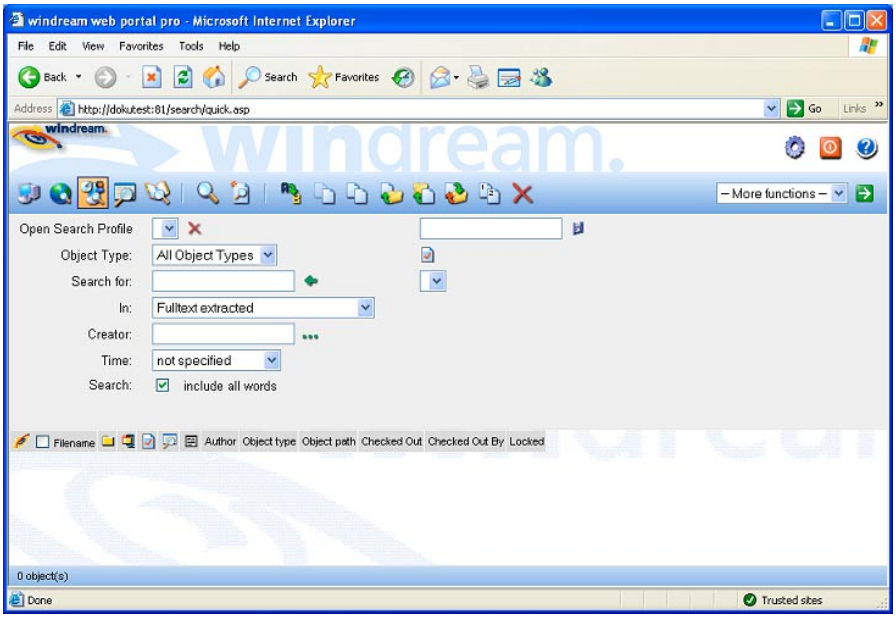

Figure 10: Quick search

How to conduct a quick search

1. Click the icon of the Quick search .
2. Select the desired entry from the dropdown list named *Object Type*.
3. Enter the desired search expression in the dropdown list named *Search for* or apply an existing entry.
4. In the dropdown list *In* you determine, in which fulltext a search shall be conducted. In the configurations on the search options page, you can determine the entry to be preset as default.
5. Via icon *Search user* in field *Creator* you select one or several creators, if the search shall be restricted to the documents of certain authors (see also chapter "Search documents of specific creators (Search users)" page 17).
6. Enter the data in the dropdown lists of the group *Time* and in the *Value* field, if you want to restrict the search to specific date and time stamps.
7. Select the option to include all words, if the search criteria entered shall be connected with "AND" in the Search for field.
8. Determine the options of the search via icon or in the configurations on the page of the search options. This depends on the question whether the conditions shall only be valid for the current search or for all searches (see chapter "Editing options for the current search ", p. 15). E.g., enable the respective checkbox, if previous versions shall also be included or if the search shall be executed as case-sensitive search (optional). If the search shall be conducted from a specific folder, you determine the folder as starting point of the search.
9. Click to start the search.

The documents and folders found are presented in the result list. The status bar of the list presents the number of objects found. At first, the number of objects presented here corresponds to the number determined in the configuration. You can load the next block of objects by clicking link *next <n> hits*, or you can change the number of objects presented by entering another number under *Maximum number of blocksize* in the search options.

You can also save the query as search profile in order to use it again later.

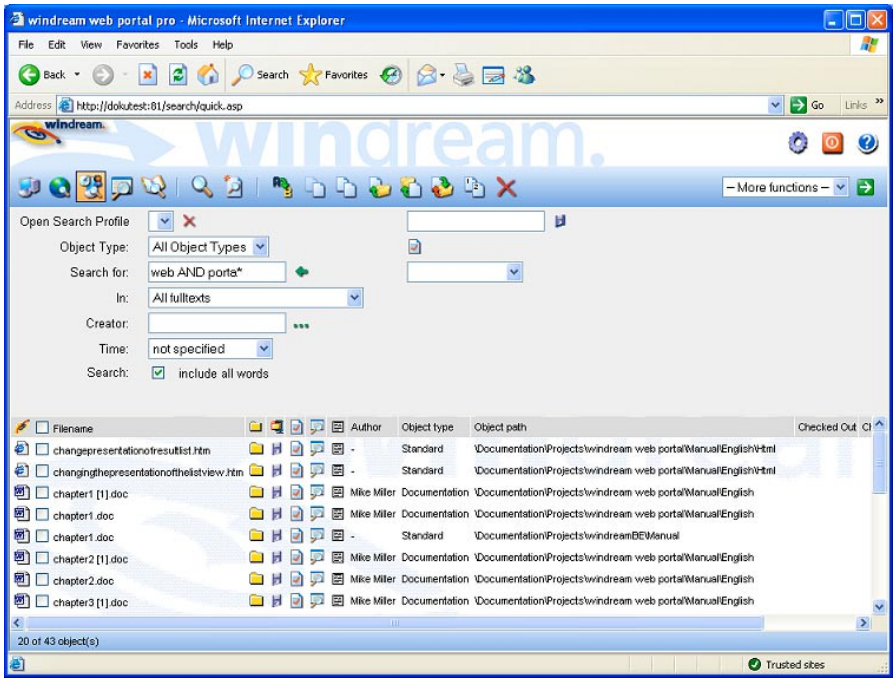
windream web portal pro - Microsoft Internet Explorer
File Edit View Favorites Tools Help
Back Search Favorites
Address http://dokutest:81/search/quick.asp
Go Links
windream.
More functions
Open Search Profile
Object Type: All Object Types
Search for: web AND porta*
In: All fulltexts
Creator:
Time: not specified
Search: include all words
Filename Author Object type Object path Checked Out
changepresentationofresultlist.htm - Standard \Documentation\Projects\windream web portal\Manual\English\Html
changingthepresentationofthelistview.htm - Standard \Documentation\Projects\windream web portal\Manual\English\Html
chapter1 [1].doc Mike Miller Documentation \Documentation\Projects\windream web portal\Manual\English
chapter1.doc Mike Miller Documentation \Documentation\Projects\windream web portal\Manual\English
chapter1.doc - Standard \Documentation\Projects\windreamBE\Manual
chapter2 [1].doc Mike Miller Documentation \Documentation\Projects\windream web portal\Manual\English
chapter2.doc Mike Miller Documentation \Documentation\Projects\windream web portal\Manual\English
chapter3 [1].doc Mike Miller Documentation \Documentation\Projects\windream web portal\Manual\English
20 of 43 object(s)
Trusted sites

Figure 11: Conducting a Quick Search

Search documents of specific creators (*Search users*)

In order to find documents of a specific creator, you apply the creator's name to the *Creator* field by clicking the ... icon (*Search user*). A list will be displayed in the lower part of the browser window, in which you can find the desired creator names.

Figure 12: Search for creator

After a search, which is started via the icon, the names of those **win**dream users whose accounts have been configured on the selected domain will be displayed.

Documents of current user

Documents that have been created by the currently logged-in user can be found by selecting the first entry of the list named *Current user* (presented in red letters).

Filter

The filter function allows to restrict the contents of the list. By entering a value in the fields of the headline of the columns *Name* and *Domain,* the list will be restricted to those elements that correspond to the value entered. The contents of the list can further be specified by entering values in several columns. Alpha-numeric character strings are allowed as input values. You can also enter wildcards (`*` and`?`). Using value `*` will find all elements of a column.

You start the filtering process with after having entered a value.

Apply value to *Creator* field (Quick Search)

The name of a user entry is applied to the *Creator* field with a click on the name. Several entries can be applied, if they are separated by semicolons.

Apply value to the *Value* field (index search)

If you want to find documents of several creators in the index search, you will have to enter a separate search term for each creator name in the list of search criteria. Thus, you can always apply only one name from the list of user entries to the *Value* field.

Index search

Each document is equipped with a structured document description consisting of index properties. These properties are determined during the acquisition and indexing of documents in the DMS. Documents are retrieved with the index search according to these index data. Additionally, a search is also possible via the fulltexts of documents. Thus, combined retrieval processes can be conducted by connecting different search expressions over the fulltexts and the indices of documents. The index search contains three groups for determining and editing search criteria.

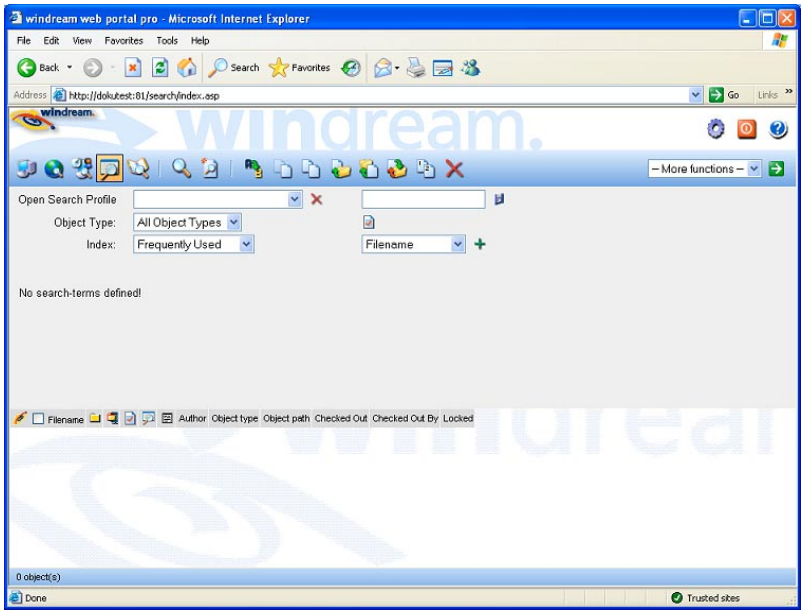

Figure 13: Index Search

Object type

The search can be restricted to specific Object Types with the respective dropdown list, and you can determine the selection of possible indices for creating the search criteria.

Index categories

The index properties which are available for creating search criteria are offered in the *Index* group. Index properties can either be system-specific or object type-specific indices. Index properties which have been determined under the currently selected Object Type in the DMS are available as well.

You select the desired index which has to be considered for the search from the categories (the dropdown list). After that, you add the index to the list of search criteria (use icon) and determine condition and value. The following categories are available:

- Frequently used indices;
- Object type-specific indices;
- Available indices;
- Date and time indices;
- Fulltext;
- Vector-indices.

List of search criteria (search terms)

In this area, you determine the search criteria (*Index*, *Condition* and *Value*). A line will be added to the list of search criteria after having selected an index property from one of the categories. Then, you determine the condition and the value in the fields of the respective columns. The search expressions in the list can be connected to search

terms by logical operators (dropdown list box in column *Operator*). The evaluation order can be changed by setting brackets around selected search expressions. Single search expressions (lines in the list) can be deleted via icon .

Searching via vector fields (vector indices)

In order to conduct a search in vector fields, you can enter the search term as condition depending on the object type, or you can select a term from the list of values and use it in the *Value* field. The selection from a list or a table via icon *Edit index* is only possible, if you select one of the conditions which are exclusively offered for vector fields:

- contains exactly
- does not contain
- contains at least one element from
- does not contain an element from
- contains all elements from
- does not contain all elements from.

Applying values into vector index fields

Select a vector index and a condition designed for vector indices. Then, open the window of the same name via icon *Edit index* . Add the desired number of lines with the respective values to the list. Depending on the operation, an input help might be available. Apply the values into the value field in the list of search criteria via icon . As default, several values will be separated by semicolons. In the configurations, you can also determine another character for separation. Already existing entries will be overwritten.

How to conduct an index search (structured search)

1. Click the icon of the index search .
2. Select the desired entry from the dropdown list *Object Type*.
3. Select the desired index from the dropdown lists of the categories (group *Index*).
4. Enable button to add the selected index to the list of search expressions. Notes on searching documents of specific creators can be found under topic "Search for documents of specific creators (search users)" page 17.
5. Determine the operator for the selected index over dropdown list *Condition*.
6. Enter the search expression in the *Value* field.
7. Repeat steps 3-6 until all desired search expressions are determined.

8. If desired, change the evaluation order by setting brackets around the respective columns (optional).
9. If necessary, change the connecting operator with which the search expressions shall be connected (optional).
10. Determine the options for the search via icon or in the configurations on the search options page. This depends on the question whether the conditions shall only be valid for the current search or for all searches (see chapter "Editing options for the current search; p. 15). E.g., enable the respective checkbox, if previous versions shall also be included or if the search shall be executed as case-sensitive search (optional). If the search shall be conducted from a specific folder, you determine the folder as starting point of the search and determine whether subfolders shall also be included.
11. Click icon to start the search.

The documents and folders found are presented in the result list. The status bar of the list presents the number of objects found. At first, the number of objects presented here corresponds to the number determined in the configuration. You can load the next block of objects by clicking link *next <n> hits*, or you can change the number of objects presented by entering another number under *Maximum number of blocksize* in the search options.

You can also save the query as search profile in order to use it again later.

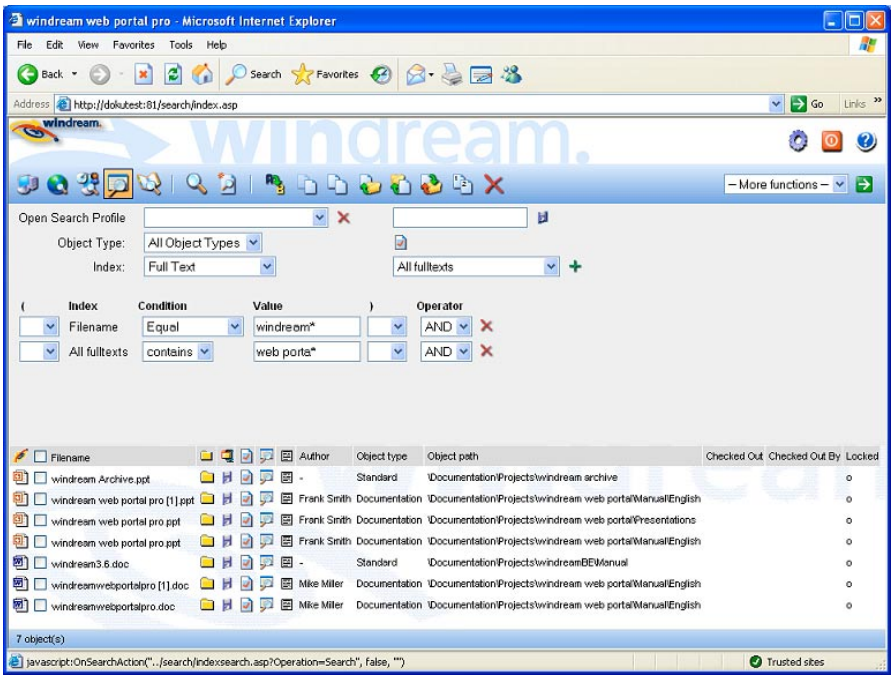
windream web portal pro - Microsoft Internet Explorer
File Edit View Favorites Tools Help
Address http://dokutest:81/search/index.asp
windream.
More functions
Open Search Profile
Object Type: All Object Types
Index: Full Text
All fulltexts
Index Condition Value Operator
Filename Equal windream* AND
All fulltexts contains web porta* AND
Filename Author Object type Object path Checked Out Checked Out By Locked
windream Archive.ppt - Standard \Documentation\Projects\windream archive
windream web portal pro [1].ppt Frank Smith Documentation \Documentation\Projects\windream web portal\Manual\English
windream web portal pro.ppt Frank Smith Documentation \Documentation\Projects\windream web portal\Presentations
windream web portal pro.ppt Frank Smith Documentation \Documentation\Projects\windream web portal\Manual\English
windream3.6.doc - Standard \Documentation\Projects\windreamBE\Manual
windreamwebportalpro [1].doc Mike Miller Documentation \Documentation\Projects\windream web portal\Manual\English
windreamwebportalpro.doc Mike Miller Documentation \Documentation\Projects\windream web portal\Manual\English
7 object(s)
javascript:OnSearchAction("../search/indexsearch.asp?Operation=Search", false, "")
Trusted sites

Figure 14: Conducting an index search

Object type search

With the Object Type Search, **win**dream web portal pro offers a function to find documents according to their assigned object type and the connected type-specific index properties. The search expressions entered in the different index fields are connected with operator "AND" by **win**dream. Single search expressions within an index field are connected with "OR". Options for the current search can be edited via the icon.

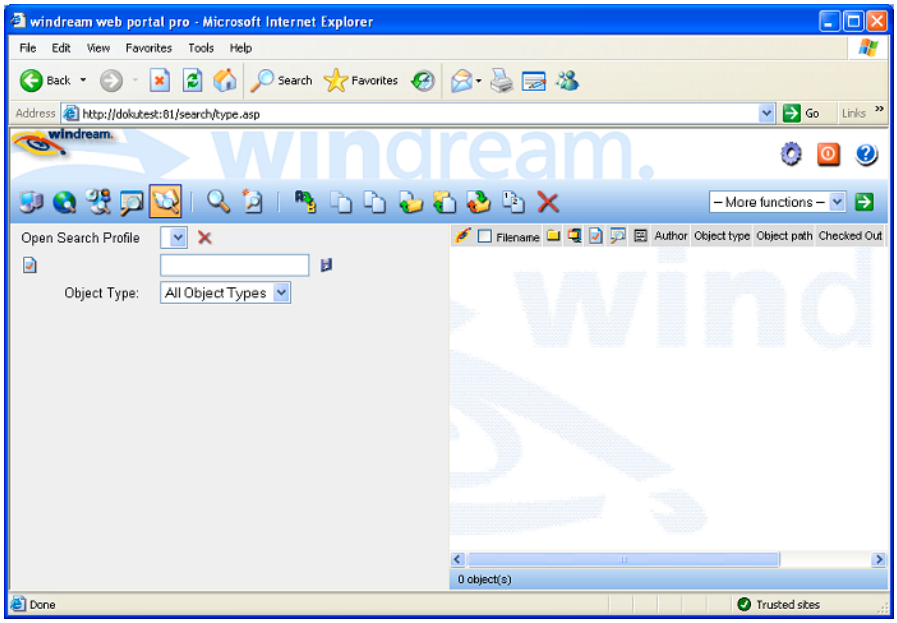

Figure 15: Object Type Search

How to conduct an object type search

1. Click the icon of the Object Type Search .
2. Select the desired entry from the dropdown list *Object Type*.
3. Enter the desired values in the object type-specific index fields.
4. Determine the options for the search via the icon or in the configurations on the page of the search options. This depends on the question whether the conditions shall only be valid for the current search or for all searches (see chapter "Editing options for the current search", p. 15). E.g., enable the respective checkboxes, if previous versions shall also be included or if the search shall be executed as case-sensistve search (optional). If the search shall be conducted from a specific folder, you determine the folder as starting point of the search and determine whether subfolders shall also be included.
5. Start the search by clicking .

The documents and folders found are presented in the result list. The status bar of the list presents the number of objects found. At first, the number of objects presented here corresponds to the number determined in the configuration. You can load the next block of objects by clicking link *next <n> hits*, or you can change the number of objects presented by entering another number under *Maximum number of blocksize* in the search options.

You can also save the query as search profile in order to use it again later.

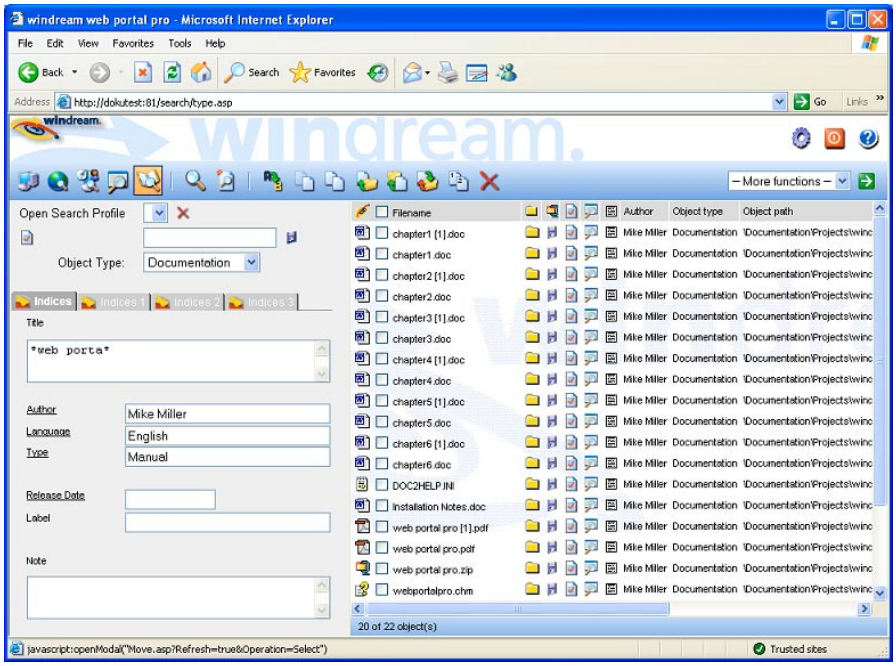

Figure 16: Conducting an Object Type Search

Fulltext search

The fulltext search of **win**dream is based on the find functions of the database used (MS SQL Server or Oracle). When conducting a fulltext search, the retrieval is executed over the contents of documents. The fulltext search allows to find documents via text elements like words, syllables or parts of sentences that occur in the documents. The fulltext search allows to find all characters of the alphabet. However, the entry of single, separate characters or special characters should be avoided in a search. You should always use coherent character strings instead. It is possible to enter word prefixes with wildcards (right truncation with "*") as search term.

When entering coherent words as character strings, so called stopwords will be ignored during the retrieval process. Stopwords are words which occur quite frequently, like for example "the", "is", and" etc. These stopwords are determined and administered by a system administrator in stopword lists within the database.

In order to restrict or further specify a search, several search terms can be connected to a complex query. Possible operators can be AND or OR.

The fulltext search does not consider a case sensitive search. This is independent of the current settings of the respective options.

The use of wildcards is supported (only "*" as wildcard for one or any number of character in expressions that begin with the search expression entered).

Fulltext searches according to text elements are possible as separate searches in the different fulltexts existing for a document or also via all fulltexts:

- Extracted fulltext,
- Manual fulltext,
- Fulltext from fulltext-searchable index fields (fulltext-searchable stringfields),
- Extended (private) fulltext (**win**dream Business Edition).

The generation, acquisition and editing of the fulltexts is either executed automatically by the **win**dream services or manually via the tab pages *Fulltext* or *Indices* in the file properties.

A search in the fulltext can either be executed via the simple search , the quick search or the index search .

Further information on the different fulltext types can be found in the **win**dream user guide.

Searching for text elements in the fulltexts

In dropdown listbox named *Search for* of a search function, you enter the search expression according to which a search will be executed in the fulltexts of documents.

Note: By selecting further search criteria via quick search button or via the index search button (for example by restricting the search to documents of a specific object type), you can restrict the search in the fulltexts.

In order to determine a search expression in field *Search for*, you enter the desired expression in the field or select an item from the list. If you enter several items separated by blanks, these expressions will automatically connected for a search with operator "OR". In order to connect the search expressions with "AND", you enable the checkbox

for including all words. Via the icon, you can edit the options of the current search.

In dropdown listbox *In* or via the selection of an index, you determine in which fulltext a search shall be executed with the search expression entered. You can choose from:

- Extracted fulltext – searching in the extracted document fulltext with the criteria entered.
- Manual fulltext – search in the manual document fulltext.
- Fulltext-searchable stringfields – a search is executed in all alpha-numeric system and DMS-specific indices of the documents, which have been marked as fulltext-searchable.
- Extended (private) fulltext (index search only) – If the selected object type provides fulltext index fields, these will occur in the list of category Fulltext and can be selected as search criteria. Then, a search will be executed in the extended fulltexts of documents (object type-specific fulltext fields).
- All fulltexts – a search is executed in all document fulltexts.

Fulltext search via simple search

Start the simple search and enter the search expression in field *Search for*. In the dropdown list *In,* you select one of the entries offered and depending on the fact whether you want to search via a specific fulltext or via all fulltexts. The search expression consists of the words to be found or fragments of words and the possible operators, for example `AND` or `OR`.

How to conduct a fulltext search with the simple search

1. Click the icon of the simple search .
2. Enter the desired search expression in field *Search for*.
3. In dropdown list named *In*, determine in which fulltext a search shall be executed. In the configurations, you can determine the entry to be used as default on the search options page.
4. Determine the options for the search via icon or in the configurations on the search options page. This depends on the question whether the conditions shall only be valid for the current search or for all searches (see chapter "Editing options for the current search", p. 15). E.g., enable the respective checkbox, if previous versions shall also be included or if the search shall be executed as case-sensitive search (optional). If the search shall be conducted from a specific folder, you determine the folder as starting point of the search and determine whether subfolders shall also be included.

5. Click to start the search.

The documents and folders found are presented in the result list. The status bar of the list presents the number of objects found. At first, the number of objects presented here corresponds to the number determined in the configuration. You can load the next block of objects by clicking link *next <n> hits*, or you can change the number of objects presented by entering another number under *Maximum number of blocksize* in the search options.

You can also save the query as search profile in order to use it again later.

Fulltext search via quick search

Start the quick search and enter the search expression in field *Search for*. In the dropdown list *In,* you select one of the entries offered, depending on the fact whether you want to search in a specific fulltext or in all fulltexts. The search expression consists of the words to be found or fragments of words and the possible operators, for example `AND` or `OR`.

How to conduct a fulltext search with the quick search

1. Click the icon of the quick search .
2. Select the desired entry from the dropdown list *Object Type*.
3. Enter the desired search expression in the dropdown list *Search for* or select an existing entry from the list.
4. In dropdown list named *In*, determine in which fulltext a search shall be executed. In the configurations, you can determine the entry to be used as default on the search options page.
5. Determine the options for the search via icon or in the configurations on the search options page. This depends on the question whether the conditions shall only be valid for the current search or for all searches (see chapter "Editing options for the current search", p. 15). E.g., enable the respective checkbox, if previous versions shall also be included or if the search shall be executed as case-sensitive search (optional). If the search shall be conducted from a specific folder, you determine the folder as starting point of the search and determine whether subfolders shall also be included.
6. Click to start the search.

The documents and folders found are presented in the result list. The status bar of the list presents the number of objects found. At first, the number of objects presented here corresponds to the number determined in the configuration. You can load the next block of objects

by clicking link *next <n> hits*, or you can change the number of objects presented by entering another number under *Maximum number of blocksize* in the search options.

You can also save the query as search profile in order to use it again later.

Fulltext search via index search

In order to conduct a search with free expressions via index search, you select entry *Fulltext* from the category *Fulltext* of the Index search. A fulltext search can be conducted with the help of this index field, or the fulltext search can be connected with the index search. Search expressions entered in the text box will be found in the fulltext of stored documents. The search expression consists of the words to be found or fragments of words and the possible operators like `AND` or `OR`.

How to conduct a fulltext search with the index search

1. Click the icon of the index search .
2. Select the desired entry from the dropdown list *Object Type*.
3. Select index Fulltext from the dropdown list of the categories.
4. In the dropdown list, determine in which fulltext a search shall be executed.
5. Click button to add the selected index to the list of search expressions.
6. Determine the desired operator via dropdown list *Condition*.
7. Enter the search expression to be used for searching in the document fulltext in field *Value*.
8. Repeat steps 3 to 7 until all desired search expressions are determined.
9. If necessary, change the evaluation order by setting brackets in the respective columns (optional).
10. If necessary, change the linking operator with which the lines shall be connected (optional).
11. Determine the options for the search via icon or in the configurations on the search options page. This depends on the question whether the conditions shall only be valid for the current search or for all searches (see chapter "Editing options for the current search", p. 15). E.g., enable the respective checkbox, if previous versions shall also be included or if the search shall be executed as case-sensitive search (optional). If the search shall be conducted from a specific folder, you determine the folder as starting point of the search and determine whether subfolders shall also be included.

12. Click to start the search.

The documents and folders found are presented in the result list. The status bar of the list presents the number of objects found. At first, the number of objects presented here corresponds to the number determined in the configuration. You can load the next block of objects by clicking link *next <n> hits*, or you can change the number of objects presented by entering another number under *Maximum number of blocksize* in the search options.

You can also save the query as search profile in order to use it again later.

Working with search profiles

User-defined retrieval processes of the search functions can be saved as profiles without results. Then, all search criteria entered and their links will be saved in a file. The stored search profiles can be loaded and used again in the respective search function.

you can determine the search options for each search profile like for example the consideration of case-sensitive search or the determination of the start folder.

The search profiles are stored by the system in a user-defined folder of the **win**dream Webserver.

You can also store the profiles as an addition to the respective search functions in **win**dream or also send emails.

Search profiles are considered as private and are thus only available for the user who created them. Furthermore, only those search profiles are available in a search function which have been created with the respective search function.

Search profiles of the index search can be executed via the **win**dream searchlets on the portal site of **win**dream web portal pro (see also chapter "The Portal Site", page 110).

Save search profile

You can save the current search profile for future retrievals with this functions (icon) after having entered the search expressions in one of the search functions. The search expressions including selected links and brackets will then be stored in a file with extension `.wdf` in a user-defined folder of the Server. Additionally, the specific or generally determined search options will be saved with the search profile.

Determining options for the search

You can determine search options, e.g. determine the start folder from which a search shall be started or determine whether a case-sensitive

search shall be conducted. These settings can be determined globally for all searches on the configuration page of **win**dream web portal or also specifically for songle profiles in the respective search function (icon).

Open search profile

Stored search profiles can be loaded again for renewed retrieval operations. Please note that the stored search profiles are only available in the specific search function in which they have been created before.

Delete search profile

Search profiles can also be deleted if they will not be used any more.

Load search profile again

The current search profile can be loaded again via icon .

Saving a search profile in windream and send it as email

Search profiles can be stored in **win**dream (icon). You can determine, whether you also want to send a profile via email to make it available to other users. In this process, the default email application will be started, the URL of the search profile will be copied to the message, and you can determine the receivers to which the profile shall be sent.

Save search profile as (Download)

You can also save search profiles via download in a selected directory of a local data carrier (click icon). The search profile can be opened and executed with a double click on the WDF file on a **win**dream Client Computer. Consequently, you can also make the profile available for other users who access **win**dream via a **win**dream Client Computer.

How to save a search profile

1. Create the desired search profile with one of the search functions (, or).
2. Enter a name for the search profile.
3. Save the search profile via icon .

How to open a search profile

1. Click the icon of the search function you want to use (, or).
2. Select the search profile to be used from the dropdown list *Open Search Profile*.

The search profile will be loaded and the search can be started via the *GO* button .

How to delete a search profile

1. Click the icon of the search function you want to use (, or).
2. Select the search profile to be deleted from the dropdown list *Open Search Profile*.
3. Delete the profile by clicking icon .

How to determine the specific search options for a search profile

1. Click the icon of the search function you want to use (, or).
2. Select the desired search profile from the dropdown list named *Open search profile list*.
3. Click the icon for editing the options of the current profile .
4. Determine the desired options here and save the settings by clicking .

The settings are only valid for the current search profile.

How to load a search profile again

1. Click the icon of the search function you want to use (, or).
2. Select the search profile to be used from the dropdown list *Open search profile*.
3. Click the icon for loading the profile again .

The search profile will be loaded again and the search can be executed via the *Start* button.

Storing search profiles in windream and sending them as emails

It is possible to make search profiles available to other **win**dream users and to use profiles created by other users. For this, you can store profiles in **win**dream by yourself or also send the links to the profiles as email.

In order to make a profile avilable to other users, you create and store the profile in one of the search functions (, or). Then, you save the profile in **win**dream and send the link to the profile via email to the desired address (icon). The receiver can open the profile via the URL and execute the respective search.

In order to be able to execute a search via the Hyperlink, the receiver must be logged on to **win**dream via the **win**dream web portal.

How to store a search profile in windream and how to send it as email

1. Click the icon of the search function you want to use (, or).
2. Create a search profile or select a profile from the dropdown list named *Open search profile*.
3. Click the icon for saving the profile in **win**dream .
4. Select the **win**dream target folder from the *Copy* window and click .
5. If required, check the checkbox for replacing available objects and / or for including previous versions.
6. Check the checkbox for sending the profile as email, if you want to send the search profile.
7. Click *OK*. The search profile will be stored in **win**dream.
8. Close the window.

If you have enabled the option to send the profile as email, the default mail application will be started now, a new message will be opened, the URL of the search profile will be inserted and you can determine the receivers to which the profile shall be sent.

Save search profile on data carrier (Download)

Create and save the respective profile in one of the search functions (, or). The download is executed after having clicked the icon for downloading a profile .

The file saved on the selected data carrier can be used for future retrievals from a **win**dream Client, or you can make it available to other users via e-mail. Receivers can open and launch the profile with a double click.

In order to execute a retrieval over the search profile, receivers must be able to access **win**dream via a **win**dream Client.

The result list

Retrieval results are displayed as a survey in result lists. Documents can then be selected for being viewed, downloaded, checked-in or –out, moved, copied or deleted.

You download the document and open it with the original application by double clicking a document entry.

The number of objects found (documents and folders) is displayed in the status bar of the list. If no objects are found that would match the search criteria, you should further specify the criteria and start the search process again. This should also be done if the number of hits is too big.

The number of hits displayed corresponds to the number determined in the *Maximum Blocksize* option of the configuration.

next <n> hits or all hits

If the number of objects exceeds the determined blocksize, you can load the next block by clicking *next <n> hits*. All documents found will be displayed via the link to view all hits. Please note that this process may take some time, depending on the number of hits.

The documents and folders found are displayed in the result list with their file- or folder name. In order to display further index data (columns) in the list, you can change the presentation of the result list, meaning the type and number of columns displayed.

Change presentation of result list

The types and the number of columns displayed can be set individually. You can determine up to ten additional columns which are displayed in the result list.

In order to configure columns, you switch to the configuration of **win**dream web portal pro by clicking icon (see chapter "Configuration", page 95).

Change sorting of the list

The list can be sorted by clicking the desired column header, which will sort the list according to the respective criterion. The selection can be reversed by clicking once again.

Download documents

You can download documents in order to view or edit them. The following methods are possible:

- Open files directly from their current place of storage (via filename link or document preview);
- Store files on an external data carrier outside the DMS (via one of the icons Save as or).

A private directory will be created for each user on the Webserver (TMP directory). This directory is created after logon to **win**dream and deleted after logout or after a time-out.

When downloading, files from **win**dream will first be placed in this directory of the Webserver. Objects will then be downloaded from there.

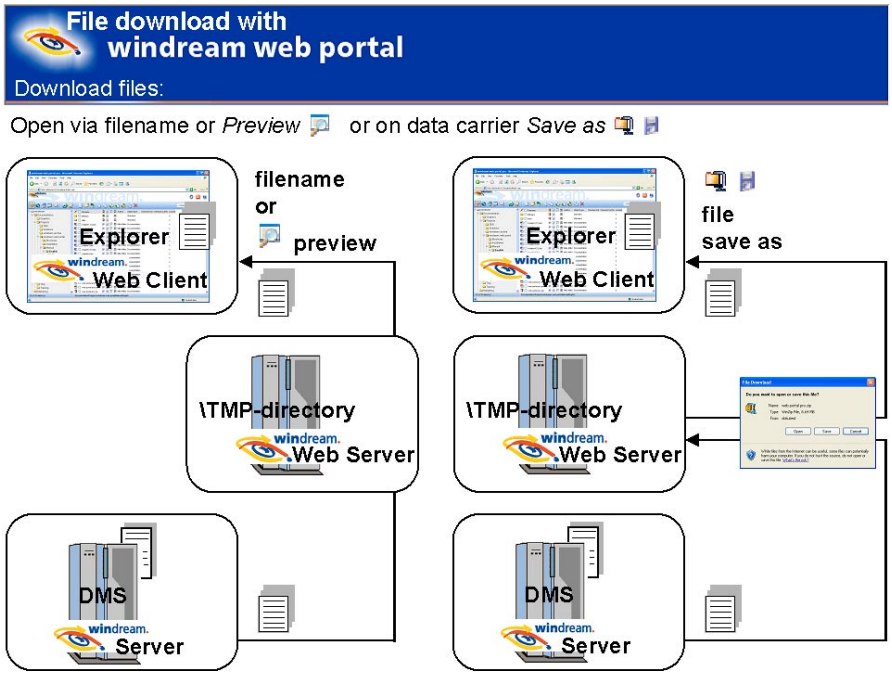

Figure 17: Download files

Viewing documents (download via filename)

A document can be opened by clicking the respective document entry in the result list. You can use the link to a document (column *Filename*) as Hyperlink and for example place it on the Desktop with drag and drop. The respective document can then be downloaded with a double click via the Desktop.

Saving documents on a local data carrier (download via *Save as* icon)

You can save documents in a selected destination folder on a local data carrier. Single documents are saved by clicking icon , several selected documents or a folder are saved with icon .

After a click on one of the icons or in the Explorer listview, the file download windows will be opened. The download process can then be started for the previously selected objects.

Note: If the option for opening the file from its current place of storage is selected, it may happen that the dialog for file download will be displayed once again. In order to avoid this, you will have to select the respective filetype from the folder options of the Windows Explorer and disable the option for confirming the opening of the file after download.

Download of several objects

There are different possibilities for downloading several objects simultaneously. You either select the desired objects in the list and execute the download process via icon from the column header, or you select a folder and click on icon in column .

If you select several objects for download, these objects will first be compressed. The selected objects will be collected in a ZIP-file (default name is `download.zip`) and will be saved in the selected destination folder. **win**dream web portal will display a respective message which must be confirmed.

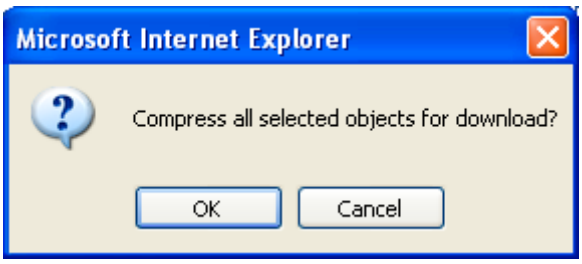

Figure 18: Compress all selected objects for download

After the download process has been finished, you extract the objects from the ZIP-file. The documents will then be available for editing. However, it is not possible to edit or change the document properties outside the DMS.

Downloaded files can be uploaded again (see also chapter "Create New Objects (Upload)" page 46). However, this is only possible if you have

a full access licence for **win**dream web portal pro and the respective rights for changing documents stored in the DMS.

Note: Please note that all files of a folder selected for a download including optional subfolders are collected in a download file. Downloading folders is executed recursively.

Configurations for Download

In order to change the preset name of the download (ZIP-) file or to determine further options for the download, you switch to the configurations with icon and select the page for configuring the download (see chapter "Configuration", page 101).

Opening a folder

A folder can be opened with a click on the respective folder entry in the result list. The contents of the selected folder are displayed in a separate browser window. The link to a folder (column *Filename*) can be used as a Hyperlink. You can place this link on the Desktop with drag and drop and open the folder from there with a double click.

Document preview

A preview is possible for certain filetypes in a separate browser window. The preview icon of an entry in the respective line indicates which files can be previewed. In order to enable the preview, you click the icon of the respective entry in the list. The document will then be displayed in a separate window. You can use the link on a document preview as a Hyperlink and place it on the Desktop. Then, the preview can be opened directly with a double click.

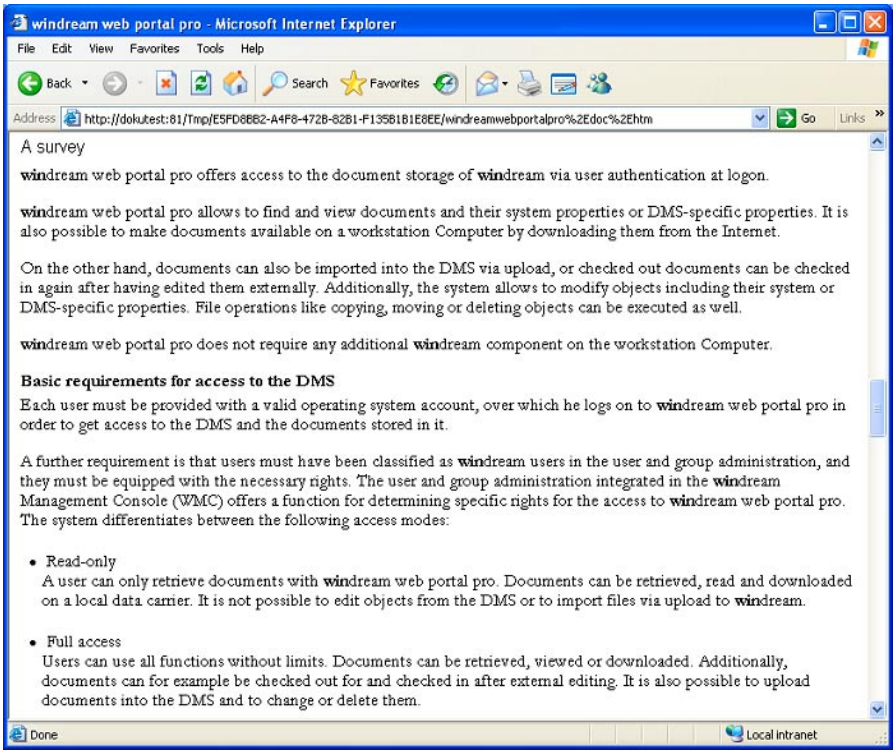
windream web portal pro - Microsoft Internet Explorer
File Edit View Favorites Tools Help
Back Search Favorites
Address http://dokutest:81/Tmp/E5FD8BB2-A4F8-472B-82B1-F135B1B1E8EE/windreamwebportalpro%2Edoc%2Ehtm
Go Links
A survey
windream web portal pro offers access to the document storage of windream via user authentication at logon.
windream web portal pro allows to find and view documents and their system properties or DMS-specific properties. It is also possible to make documents available on a workstation Computer by downloading them from the Internet.
On the other hand, documents can also be imported into the DMS via upload, or checked out documents can be checked in again after having edited them externally. Additionally, the system allows to modify objects including their system or DMS-specific properties. File operations like copying, moving or deleting objects can be executed as well.
windream web portal pro does not require any additional windream component on the workstation Computer.
Basic requirements for access to the DMS
Each user must be provided with a valid operating system account, over which he logs on to windream web portal pro in order to get access to the DMS and the documents stored in it.
A further requirement is that users must have been classified as windream users in the user and group administration, and they must be equipped with the necessary rights. The user and group administration integrated in the windream Management Console (WMC) offers a function for determining specific rights for the access to windream web portal pro. The system differentiates between the following access modes:
Read-only
A user can only retrieve documents with windream web portal pro. Documents can be retrieved, read and downloaded on a local data carrier. It is not possible to edit objects from the DMS or to import files via upload to windream.
Full access
Users can use all functions without limits. Documents can be retrieved, viewed or downloaded. Additionally, documents can for example be checked out for and checked in after external editing. It is also possible to upload documents into the DMS and to change or delete them.
Done
Local intranet

Figure 19: Document Preview

Viewing and editing fulltexts

Different fulltexts may exist for each document. There is a differentiation between the following types of fulltext:

- Extracted fulltext
- Manual fulltext
- fulltext from fulltext-searchable index fields
- Extended (private) fulltext.

The generation, acquisition and editing of fulltexts is either executed automatically by the **win**dream services (**win**dream fulltext indexing service, **win**dream DMS-service) or manually via tab pages *Fulltext* or *Indices* of the file properties.

You can execute a search for documents via text elements contained in the fulltexts and conduct a search via all fulltexts or a specific fulltext type.

In order to view or edit the fulltexts, click the *Fulltext* icon or the *Properties* icon in the column of the same name. The fulltexts are displayed on the respective tab page in the window of the object properties.

Note: Fulltext can also be created for folders. Thus, you can acquire and edit manual fulltext via the folder properties. Contents entered as index criteria in fulltext-searchable index fields will also be extracted and saved. In addition to this, it is also possible to acquire private fulltext when editing the index properties.
The display and editing of the different fulltexts for folders is the same as for documents.

Extracted fulltext

The document fulltext can be extracted from original files stored in **win**dream, and the fulltext is generated with the **win**dream fulltext indexing service. After each change of the original files, the fulltext generation will be started again. The fulltext creation is executed asynchronously meaning not equal in time with the file storage in the DMS. The fulltext indexing service searches for new or modified documents in the database and in specific periods of time. Fulltext will be created for these documents.

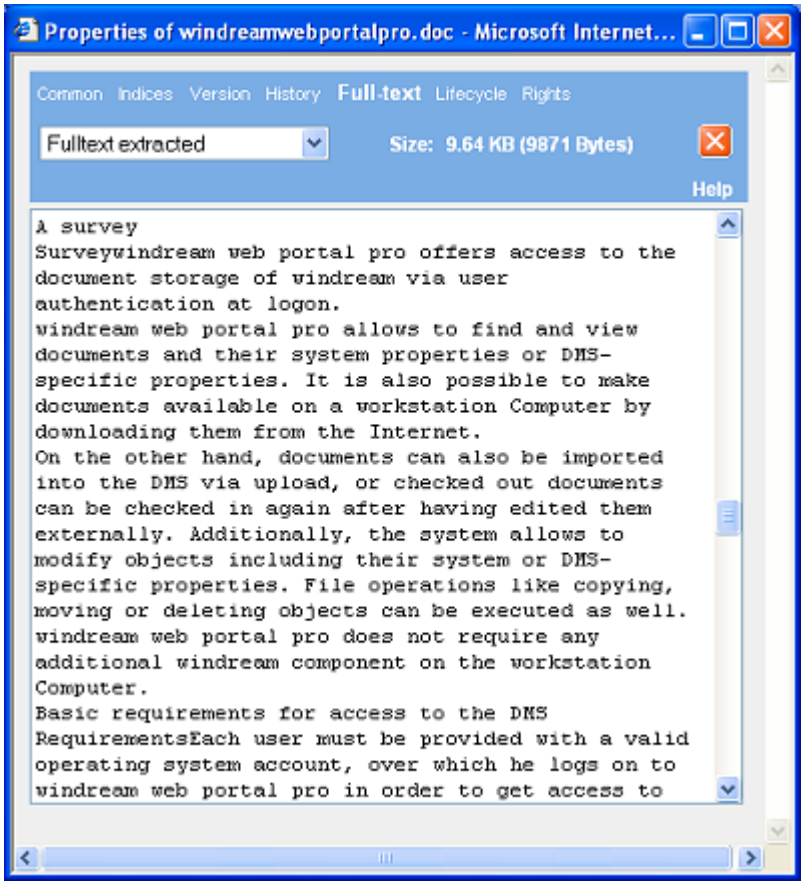
Properties of windreamwebportalpro.doc - Microsoft Internet...
Common Indices Version History Full-text Lifecycle Rights
Fulltext extracted
Size: 9.64 KB (9871 Bytes)
Help
A survey
Surveywindream web portal pro offers access to the document storage of vindream via user authentication at logon.
windream web portal pro allows to find and view documents and their system properties or DMS-specific properties. It is also possible to make documents available on a workstation Computer by downloading them from the Internet.
On the other hand, documents can also be imported into the DMS via upload, or checked out documents can be checked in again after having edited them externally. Additionally, the system allows to modify objects including their system or DMS-specific properties. File operations like copying, moving or deleting objects can be executed as well.
windream web portal pro does not require any additional windream component on the workstation Computer.
Basic requirements for access to the DMS
RequirementsEach user must be provided with a valid operating system account, over which he logs on to windream web portal pro in order to get access to

Figure 20: Extracted fulltext

Manual fulltext

It is also possible to acquire further fulltext as manual fulltext of a document. This kind of fulltext will not be created by the **win**dream fulltext indexing service, but is entered manually via the *Fulltext* tab page of the document properties or via a respective interface function.

Manual fulltext will not be deleted or changed automatically, if changes have been made on the original document. Changes must be made manually. Changes on the manual fulltext are made via the fulltext tab page of the file properties or via interface functions.

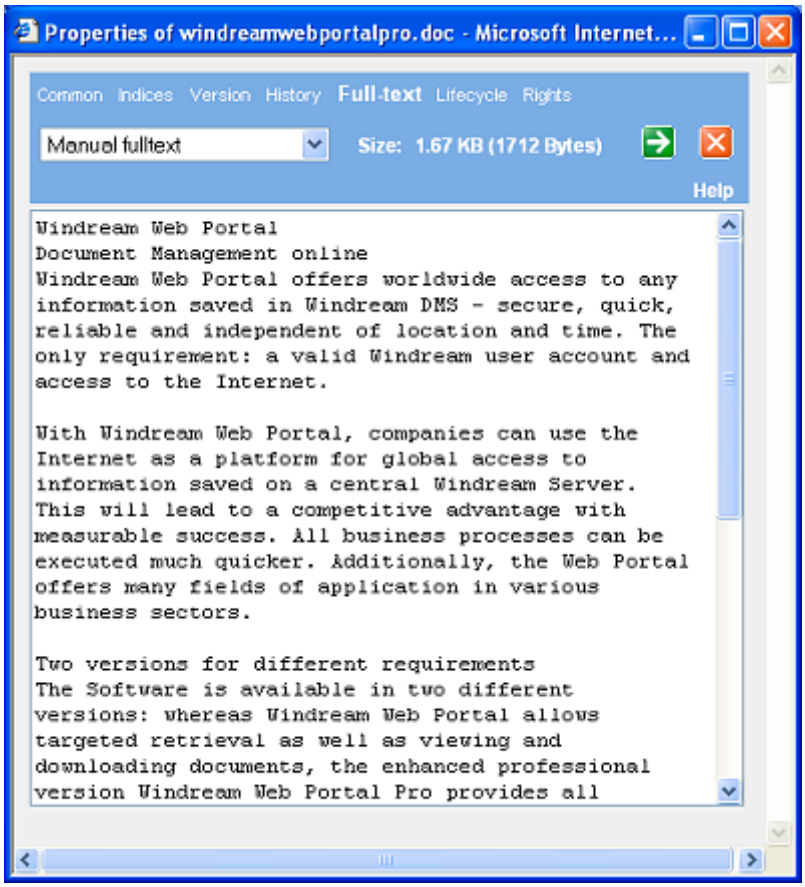
Properties of windreamwebportalpro.doc - Microsoft Internet...
Common Indices Version History Full-text Lifecycle Rights
Manual fulltext
Size: 1.67 KB (1712 Bytes)
Help
Windream Web Portal
Document Management online
Windream Web Portal offers worldwide access to any information saved in Windream DMS - secure, quick, reliable and independent of location and time. The only requirement: a valid Windream user account and access to the Internet.
With Windream Web Portal, companies can use the Internet as a platform for global access to information saved on a central Windream Server. This will lead to a competitive advantage with measurable success. All business processes can be executed much quicker. Additionally, the Web Portal offers many fields of application in various business sectors.
Two versions for different requirements
The Software is available in two different versions: whereas Windream Web Portal allows targeted retrieval as well as viewing and downloading documents, the enhanced professional version Windream Web Portal Pro provides all

Figure 21: Manual fulltext

Fulltext-searchable index fields

Further on, documents can be indexed via so-called fulltext-searchable index fields. These index properties are marked as fulltext-searchable when defining object types in the **win**dream Management Console. The contents of these index fields is additionally extracted as fulltext. The fulltext or fulltext-searchable index fields will be updated by the **win**dream service after changes on the index fields have been made. This fulltext can be viewed via the fulltext tab page of the file properties.

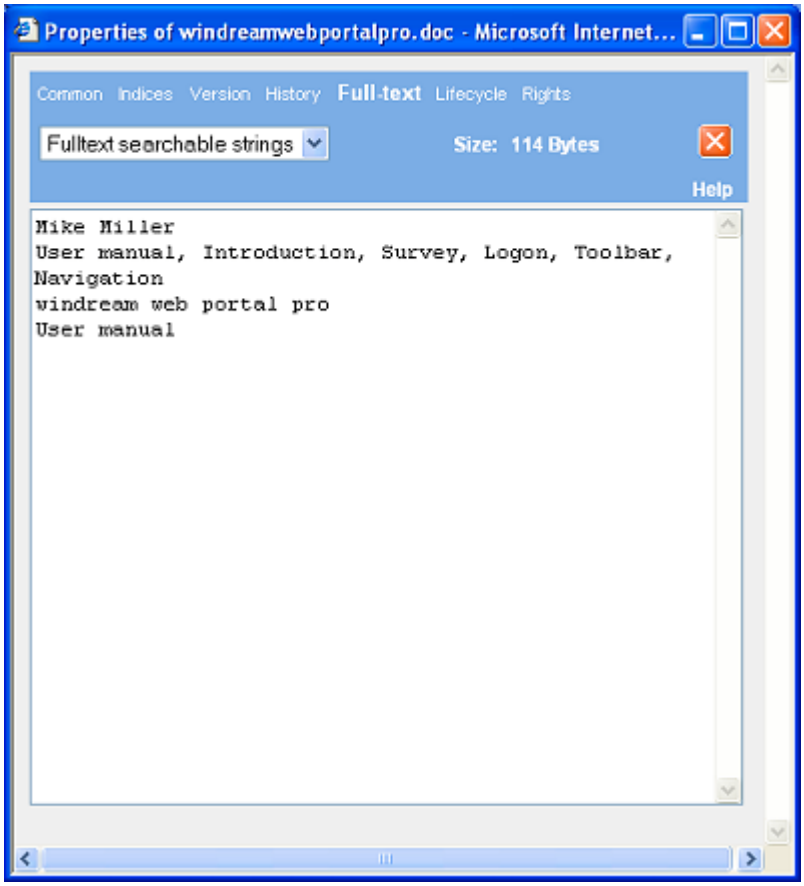

Figure 22: Fulltext-searchable index fields

Extended (private) fulltext

It is also possible to acquire extended (private) fulltext for documents of specific document types (**win**dream Business Edition required). Thus, a fulltext index must have been created in the WMC, which will then be assigned to a document type as a document type-specific index field. This fulltext, like other object type-specific index properties, is acquired and edited via the index tab page of the file properties. Changes on the extended fulltext will only be updated after a respective modification in this field via the indices tab page of the file properties in the DMS.

Ho to acquire manual fulltext of a document

1. Open the properties by clicking of the desired object and switch to the fulltext tab page.
2. Select entry `Manual` fulltext from the dropdown list.
3. Add the text (manual or via clipboard) which shall be acquired as manual fulltext.
4. Click .

Manual fulltext can also be acquired via interface functions.

How to acquire fulltext in fulltext-searchable string fields or extended fulltext of a document

The acquisition and editing of fulltext from fulltext-searchable index fields and the extended fulltext is executed via the indices tab page of the file properties when indexing documents.

1. Open the file properties of the document for which the fulltext shall be acquired manually by clicking .
2. Switch to tab page *Indices*.
3. Select the desired object type from dropdown list *Object type*.
4. Enter the index data in the object type-specific index fields.
5. If the object type provides a field for acquiring extended fulltext, enter the text to be used as manual fulltext there.
6. Click to save the entries.

Viewing document properties

Via the properties icon of a list entry, you can view and edit the document or folder properties of a selected object.

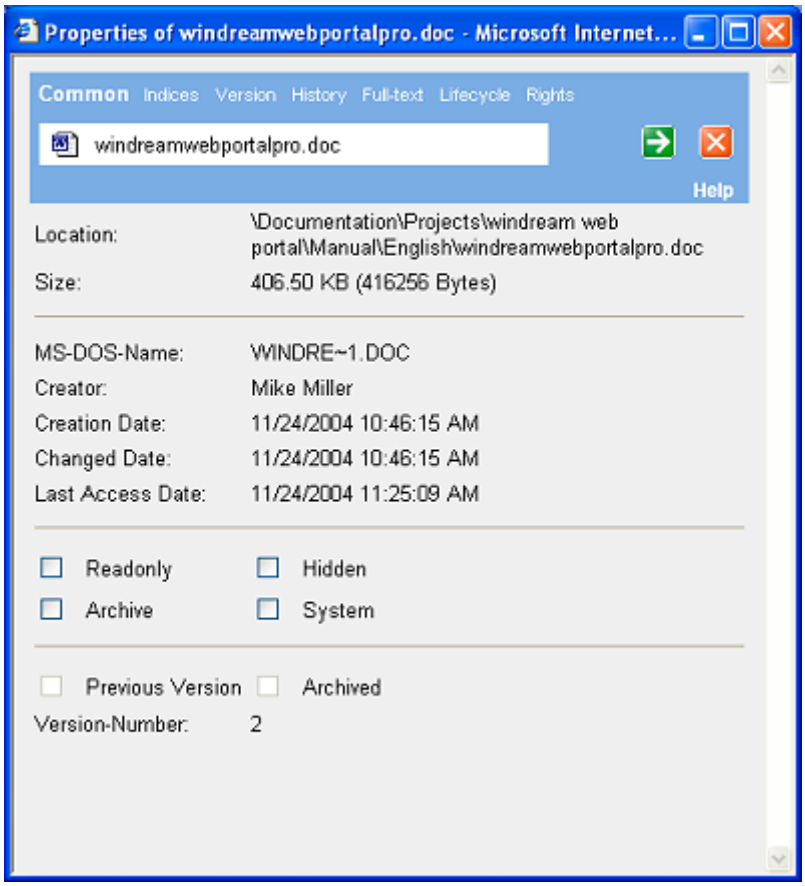

Figure 23: Object properties

Indices

In order to view and edit index data, you switch to tab page *Indices*. However, indices can only be changed if you have the right to edit and modify the respective document (see also chapter "**win**dream rights", page 62).

The indexing of new objects or existing objects without indices is also executed in this window (see also chapter "Indexing Objects", page 58).

The index fields can be placed on several tab pages (named *Indices 1*, *Indices 2* up to *Indices n*). The single pages are selected via the respective link on the tabs. The number of tabs per line can be determined in the configuration.

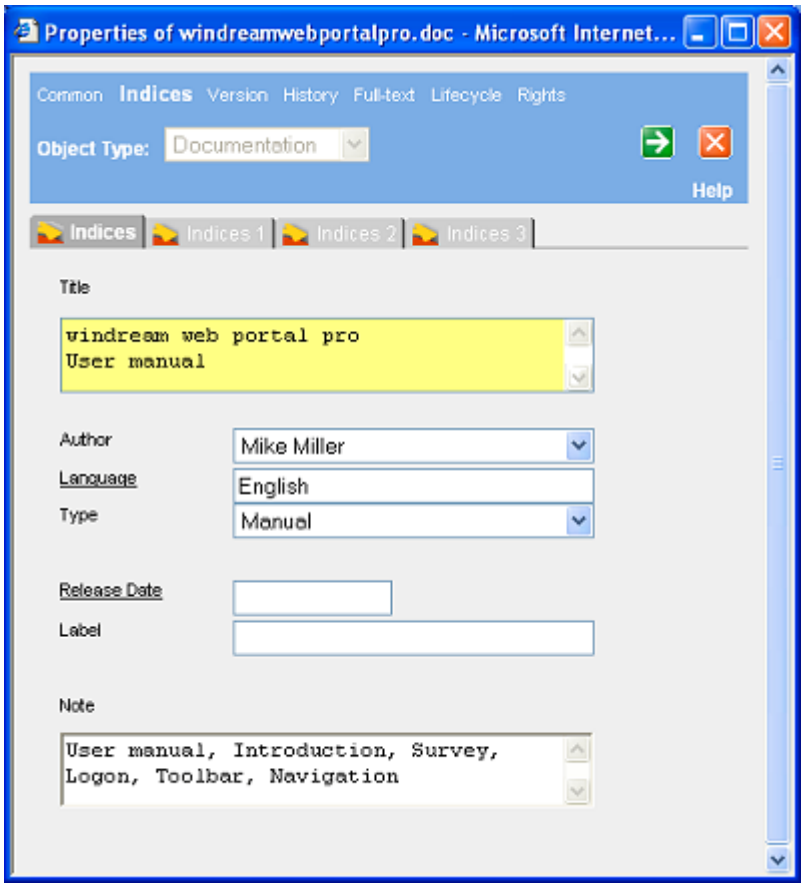

Figure 24: Tab page *Indices*

Version

Several document versions can be administered in **win**dream. A new version of a document is a copy of the original document with an ascending linear number. Always the current version of a document is available. Previous versions are automatically equipped with the *Hidden* attribute by the system, and they will only be displayed in the Explorer, if the respective option has been set.

The current version, the version number, and the previous versions of a document can be viewed via the respective tab page.

A retrieval may also include previous versions of documents.

New versions are created via function *Create new version* or optionally when checking in documents, or during an upload of files.

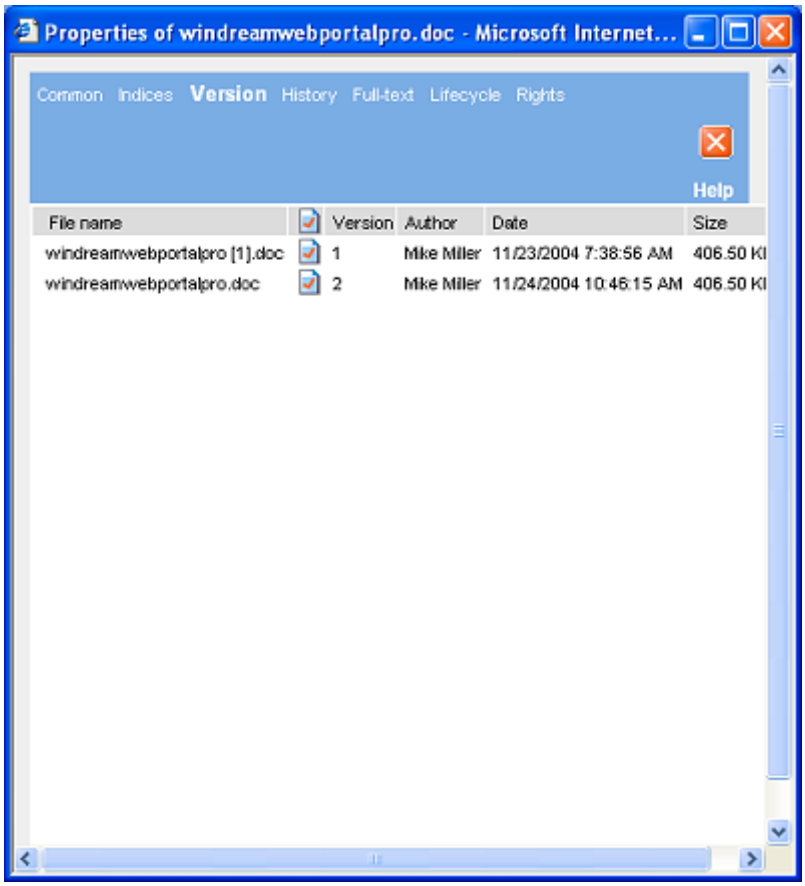

Figure 25: Tab page *Version*

History

A history is written for each document and folder in the **win**dream drive. The history gives a detailed overview on the creation and modification of objects. It can be viewed via tab page *History*.

Adding a history entry

In addition to the entries created by the system, you can also add your own entries. A basic requirement is that you have the right for changing the document or folder.

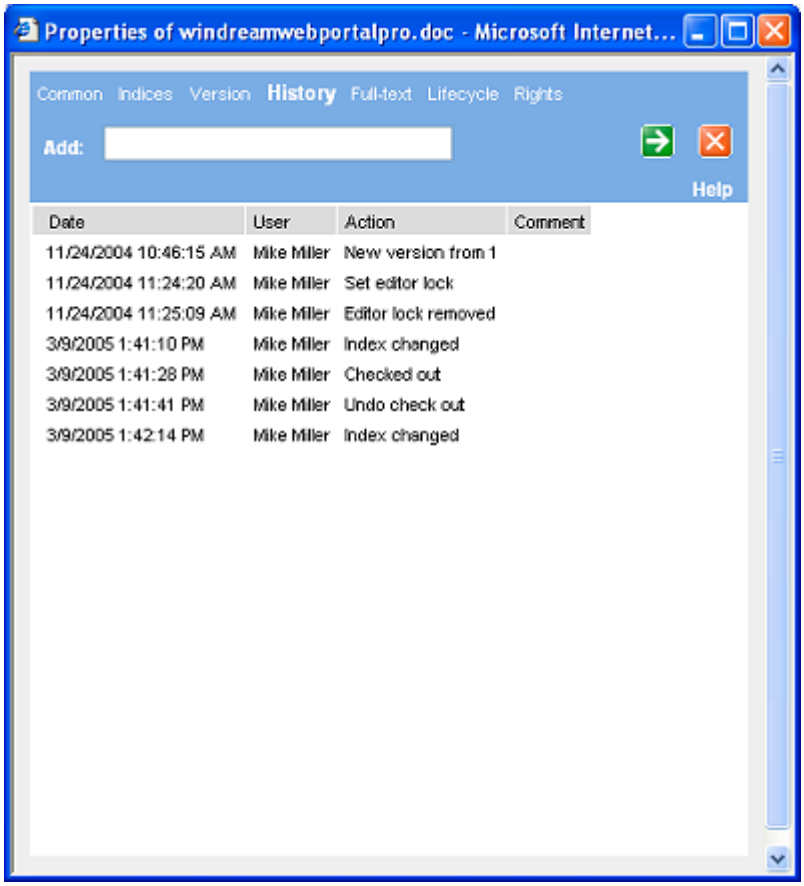
Properties of windreamwebportalpro.doc - Microsoft Internet...
Common Indices Version History Full-text Lifecycle Rights
Add:
Help
Date User Action Comment
11/24/2004 10:46:15 AM Mike Miller New version from 1
11/24/2004 11:24:20 AM Mike Miller Set editor lock
11/24/2004 11:25:09 AM Mike Miller Editor lock removed
3/9/2005 1:41:10 PM Mike Miller Index changed
3/9/2005 1:41:28 PM Mike Miller Checked out
3/9/2005 1:41:41 PM Mike Miller Undo check out
3/9/2005 1:42:14 PM Mike Miller Index changed

Figure 26: Tab page *History*

How to add an entry to the history of a document / folder

1. Open the properties of the desired object via icon and switch to tab page *History*.
2. Enter the comment for the history in field *Add*.
3. Confirm your entry with .

Life-cycle

The life-cycle function integrated in **win**dream allows to automatically administer life-cycle data of documents stored in the DMS, beginning with the date of creation until final deletion from the archive. The data of the life-cycle of a document can be viewed via the respective tab page.

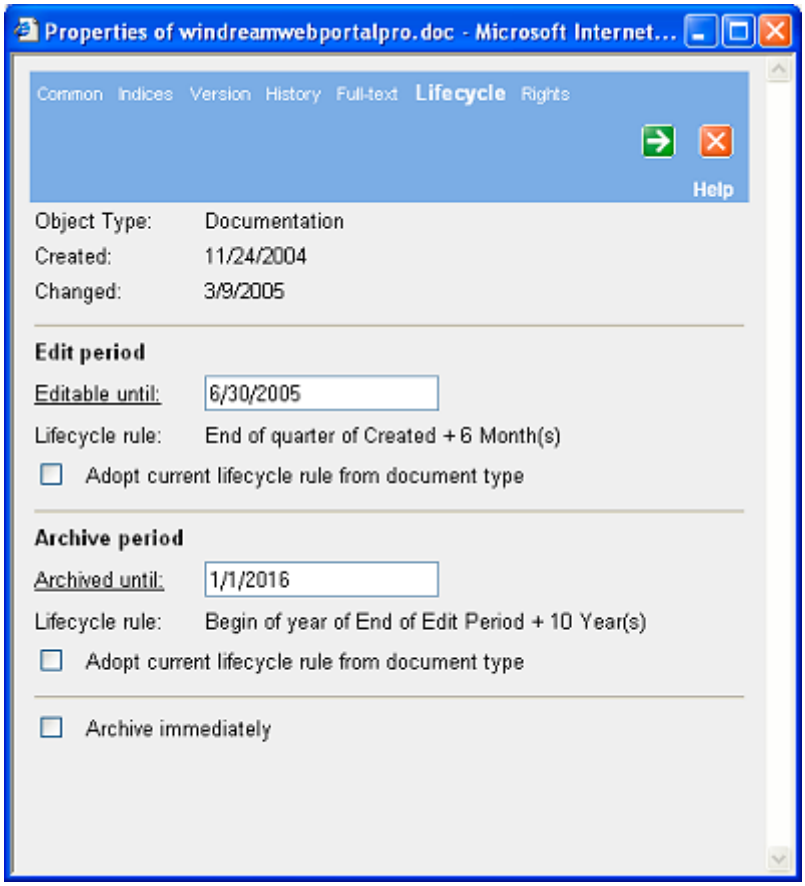
Properties of windreamwebportalpro.doc - Microsoft Internet...
Common Indices Version History Full-text Lifecycle Rights
Help
Object Type: Documentation
Created: 11/24/2004
Changed: 3/9/2005
Edit period
Editable until: 6/30/2005
Lifecycle rule: End of quarter of Created + 6 Month(s)
Adopt current lifecycle rule from document type
Archive period
Archived until: 1/1/2016
Lifecycle rule: Begin of year of End of Edit Period + 10 Year(s)
Adopt current lifecycle rule from document type
Archive immediately

Figure 27: Tab page *Life-Cycle*

Rights

The access rights of a document or a folder can be viewed by enabling the respective tab page. The existing user accounts and groups are listed there with their assigned access rights. If the checkmark in one of the columns (read-only, write, rights) is enabled, the respective right is set for the group.

If you or the group in which you are member has the right of changing the document rights, you can edit the access rights (see also chapter "**win**dream rights", page 62).

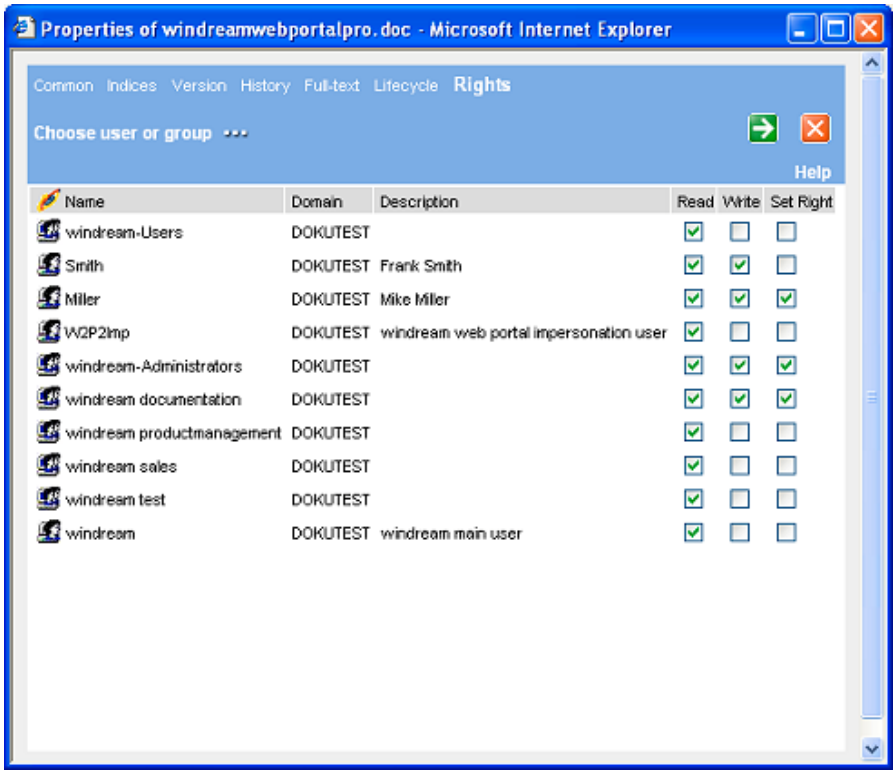
Properties of windreamwebportalpro.doc - Microsoft Internet Explorer
Common Indices Version History Full-text Lifecycle Rights
Choose user or group ...
Help
Name Domain Description Read Write Set Right
windream-Users DOKUTEST
Smith DOKUTEST Frank Smith
Miller DOKUTEST Mike Miller
W2P2Imp DOKUTEST windream web portal impersonation user
windream-Administrators DOKUTEST
windream documentation DOKUTEST
windream productmanagement DOKUTEST
windream sales DOKUTEST
windream test DOKUTEST
windream DOKUTEST windream main user

Figure 28: Tab page *Rights*

Creating new objects (upload)

You can save new objects in **win**dream via upload. You can import files and create new folders in the **win**dream drive. Additionally, it is also possible to index new objects directly after having saved them.

A new folder is created via icon . **win**dream web portal offers different possibilities for importig files:

- To import single files into **win**dream via function *New file* (see chapter "Create new file (icon New file)", p. 49) or
- to apply several files simultaneously with drag and drop from the Windows Explorer via the *Upload* icon (see chapter "Upload via the Upload icon", p. 52).

Requirement for an upload via Drag&Drop(function *Upload*)

An upload via drag&drop or via a dialog by clicking the icon (Microsoft Web Publishing ActiveX) is only possible with Microsoft's Internet Explorer. Netscape cannot display any ActiveX components.

Note: If you use Microsoft Internet Explorer and if the upload icon does not occur in the **win**dream icon bar, this may have different reasons. Either, the option for viewing the upload Control has not been enabled in the configuration on the page for configuring the navigation bar, or Microsoft Web Publishing Wizard is not installed. In this case, ask your system administrator.

Creating a new folder

In order to create a new folder, you first switch to the hierarchic search (Explorer). In the Explorer view, you select the destination directory and click the *New folder* icon.

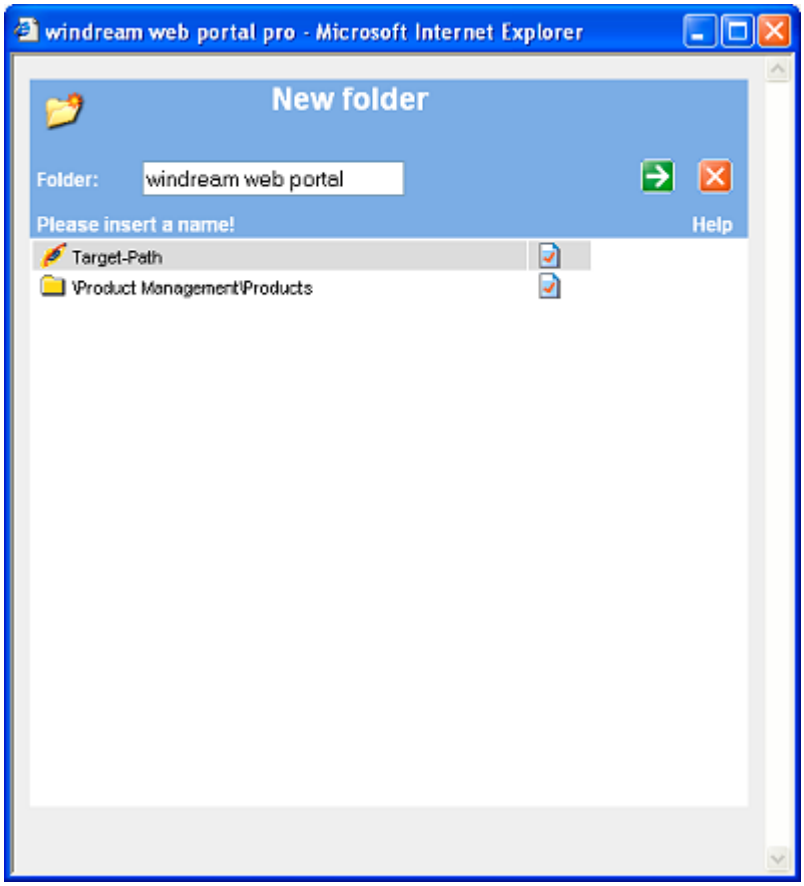

Figure 29: New Folder

Create folder

Via the properties icon in column you can view the folder properties of the destination directory. Enter the name of the new folder in the respective field and click .

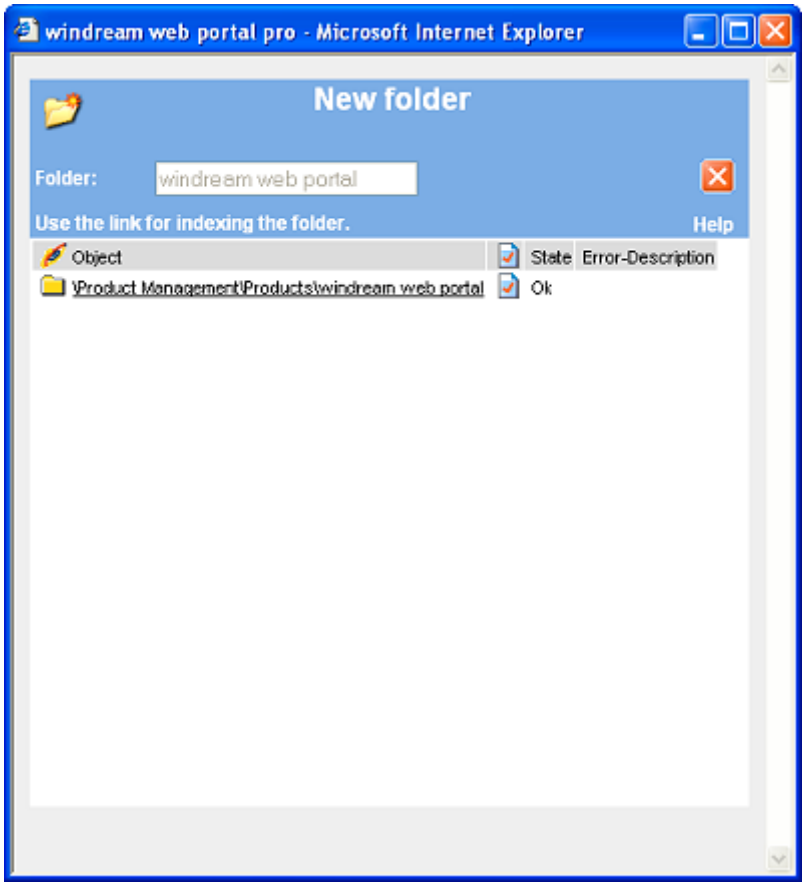

Figure 30: New Folder Created

Index folder

You can index the folder via the link in column *Object* or via the properties icon in column . You can also view and edit the folder properties (for example add a history entry or assign access rights).

In case an error occurs, a message will be displayed in the column of the *Error Description*.

How to create a new folder

1. Click the icon of the hierarchic search (Explorer).
2. In the Explorer view, select the folder in which the new folder shall be created.
3. Click the icon *New folder*.
4. Enter the name of the new folder in window *New folder*.
5. Click to create the folder in the determined directory.

The new folder will be displayed as a link in the list. Via this link or via the folder properties (icon *Properties*) you can index the folder.

Creating a new file (icon *New File*)

In order to create or import a new file in **win**dream via icon in **win**dream, you first switch to the hierarchic search . Select the destination directory in the Explorer view. Via icon , you import the new file into the DMS.

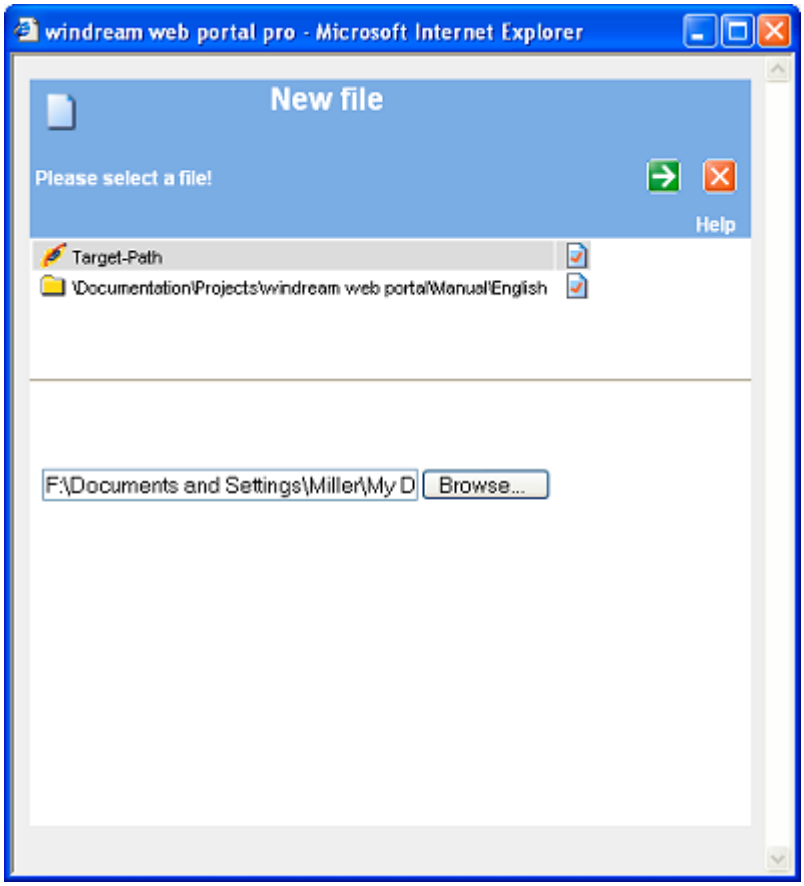

Figure 31: New file

Select file

Via the properties icon in column , you can view the folder properties of the destination directory.

You select the desired file on the data carrier using command button *Browse*.

Click to determine the options for uploading the file in the following window.

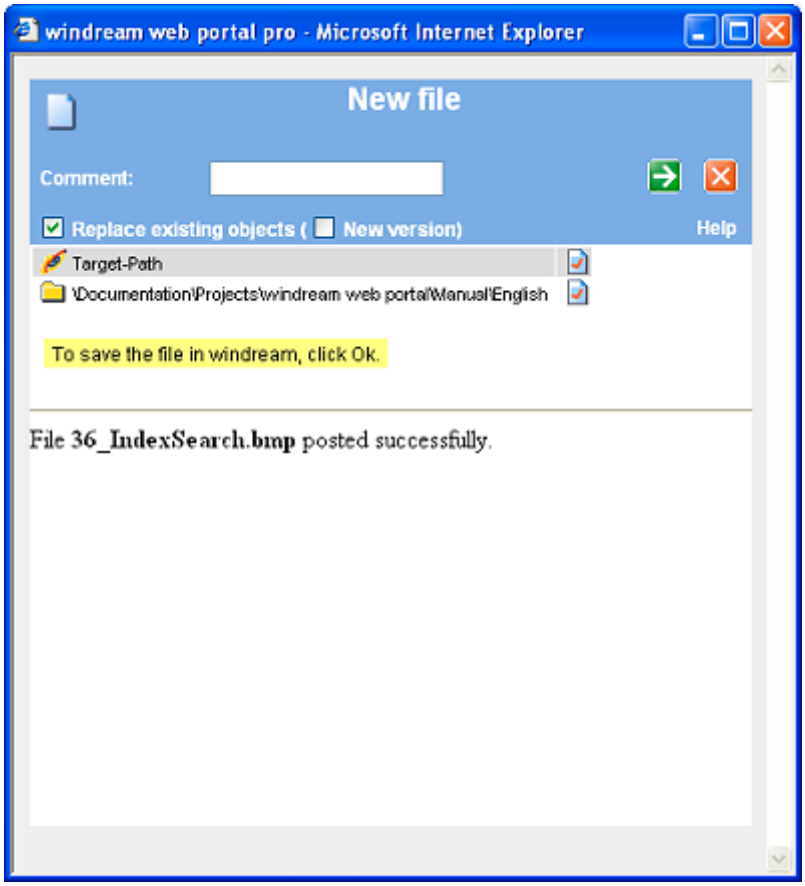

Figure 32: Uploading a new file

You can enter a comment in the respective field. The comment will then be saved in the history.

Via checkmark *Replace existing objects*, you determine whether already existing objects will be replaced or not. As a further option, you can also create a new document version when uploading a file (checkmark *New version*).

Click to execute the download process and to save the file in **win**dream.

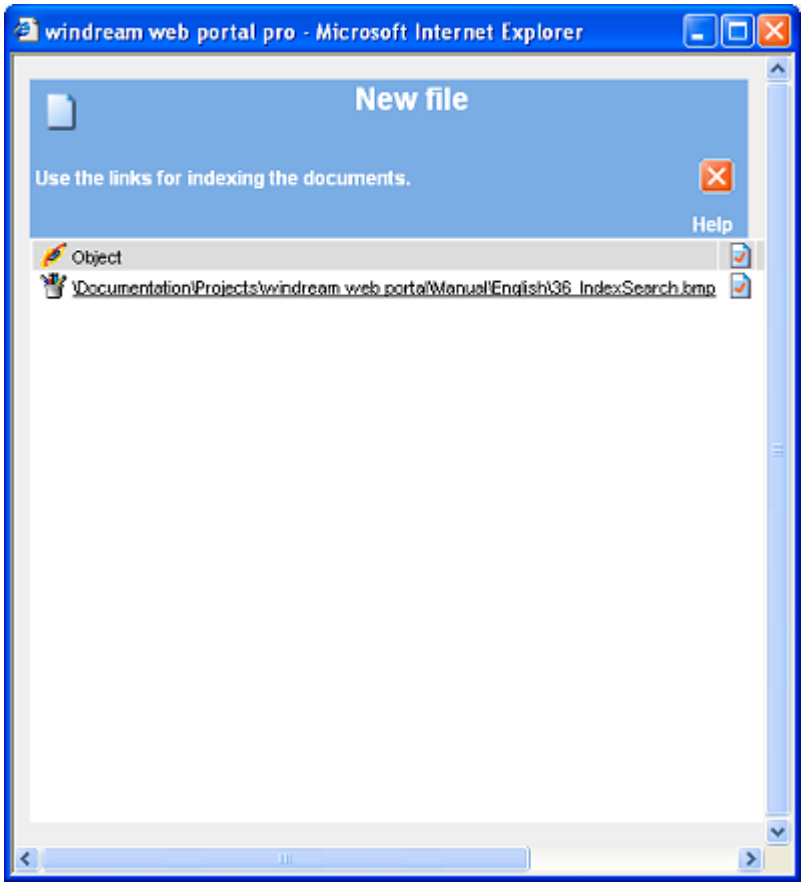

Figure 33: New file created

The process is logged in the report window. A line with the filename, the status, and an error description will be edited. If an error occurs, the entries will be displayed in the status and the error description column.

Index file

Via the link in column *Destination Directory* or via the properties (icon *Properties*) in column , you can index the file or you can view and edit the file properties.

How to create a new file (icon New File)

1. Click the icon of the hierarchic search (Explorer) .
2. In the Explorer view, select the folder in which you want to create the new file.
3. Click icon *New File* .
4. Enable the *Browse* button and select the file on the data carrier which you want to save in **win**dream.
5. Click in window *New File*.
6. Enter a comment in the following window (optional).

7. Enable the respective checkmark if you want to replace existing objects.
8. Enable the *New Version* checkmark to create a new version of the document
9. Click to save the file in **win**dream.

The new file will be displayed as a link in the list. You can index the file over this link or via the file properties with button .

Note: If you use Microsoft Internet Explorer and Microsoft Web Publishing ActiveX is installed, you can also execute an upload process via drag and drop from the Windows Explorer by clicking the *Upload* icon in **win**dream web portal pro. Using this method, it is also possible to import several files at the same time.

Upload via the *Upload* icon

With the *Upload* function, you import files via drag and drop or in a dialog-oriented way from the Windows Explorer via the upload directory into **win**dream. Via the upload function, you can create new files in **win**dream or check in files again which have been checked out previously. An upload process can be started for a single or for several files simultaneously. A requirement is that you use Microsoft Internet Explorer and that the upload control page is visible, which must have been configured on the configuration page of the Toolbar (see chapter "Toolbar", p. 105).

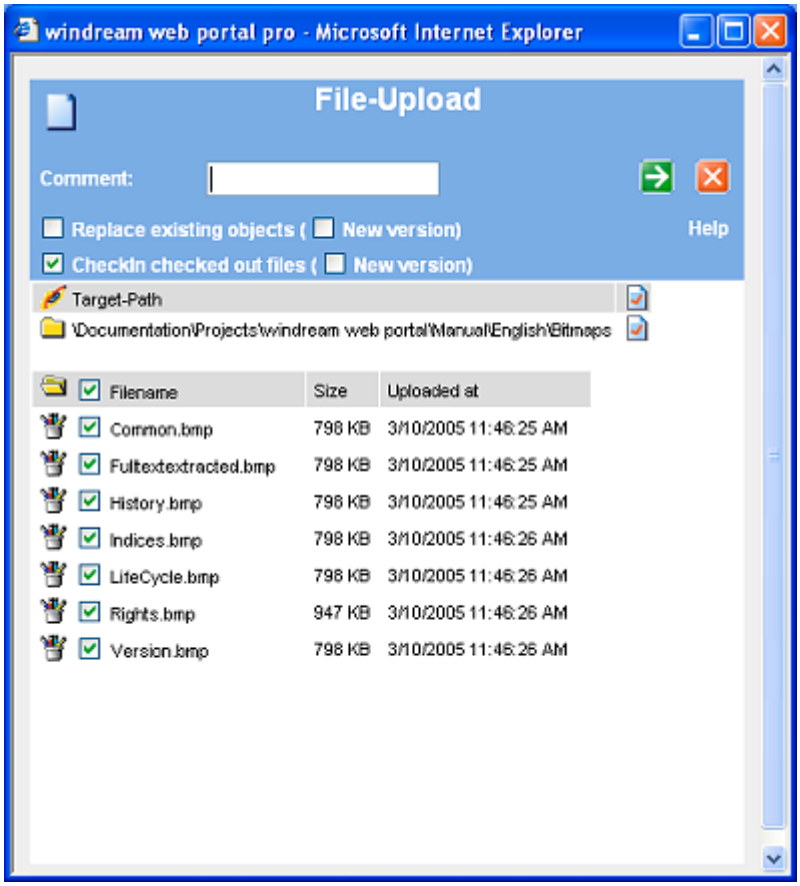
windream web portal pro - Microsoft Internet Explorer
File-Upload
Comment:
Replace existing objects (New version)
Help
Checkin checked out files (New version)
Target-Path
\Documentation\Projects\windream web portal\Manual\English\Bitmaps
Filename
Size
Uploaded at
Common.bmp 798 KB 3/10/2005 11:46:25 AM
Fulltextextracted.bmp 798 KB 3/10/2005 11:46:25 AM
History.bmp 798 KB 3/10/2005 11:46:25 AM
Indices.bmp 798 KB 3/10/2005 11:46:26 AM
LifeCycle.bmp 798 KB 3/10/2005 11:46:26 AM
Rights.bmp 947 KB 3/10/2005 11:46:26 AM
Version.bmp 798 KB 3/10/2005 11:46:26 AM

Figure 34: Importing files via the upload function

How to import files via drag and drop with the *Upload* icon

1. In **win**dream web portal, click the icon of the hierarchic search (Explorer) .
2. In the Explorer view, select the folder in which the files shall be placed.
3. Select the files to be stored in the Windows Explorer.
4. Drag the files on the *Upload* icon in the icon bar of **win**dream web portal pro.
5. Enter a comment in the file upload window (optional).
6. Check the box for replacing available objects, if available objects shall be overwritten in the destination folder, and check the box for the new version, if new versions of the documents shall be generated.
7. Check the box for checking in files which have previously been checked out, if you want to check in documents, and click the checkmark for new version, if you versions shall be created on check-in.
8. Select the files to be imported in the *Filename* column.
9. Click to save the files in **win**dream.

Upload directory

A private directory (the upload directory) is created on the Webserver for each user. This directory is created after logon to **win**dream. It will be deleted again after logout or after a time-out.

When uploading, the files will first be placed in the upload directory on the Webserver. The objects will then be moved from there to the final **win**dream directory.

Depending on the action executed, the directory will either be opened automatically, or it can be opened in **win**dream web portal pro via icon .

Files will be placed in the upload directory if one of the following actions is executed:

- Creating a new file or
- Checking files in via drag and drop or in a dialog-oriented way from the Windows Explorer by clicking icon .
- Importing objects via drag and drop or in a dialog-oriented way from the Windws Explorer in **win**dream via the icon.

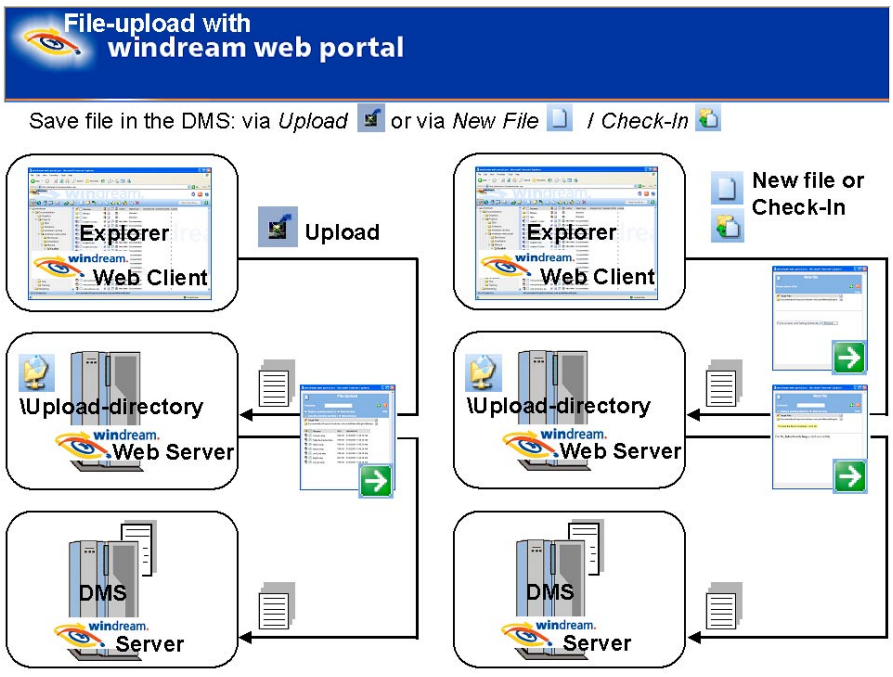

Figure 35: Saving files in the DMS (upload)

The upload directory is opened in **win**dream web portal pro via icon . The files stored there are displayed in a browser window. Specific

options can be determined for the file storage in **win**dream (for example creating new versions).

Additionally, you can also store all objects in **win**dream or single objects only.

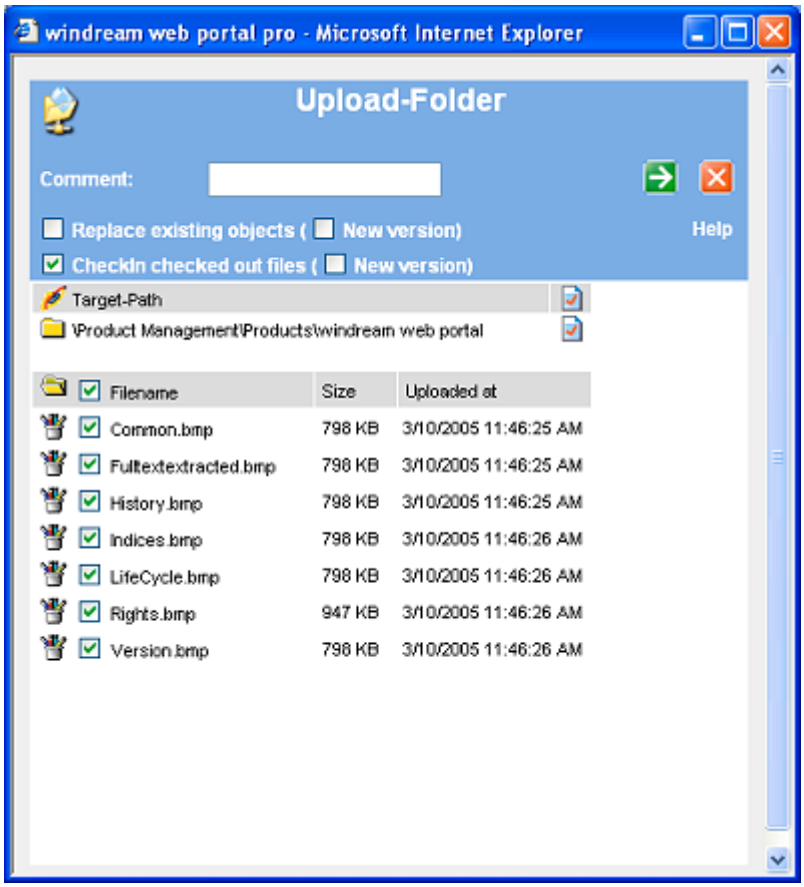
windream web portal pro - Microsoft Internet Explorer
Upload-Folder
Comment:
Replace existing objects (New version)
Help
CheckIn checked out files (New version)
Target-Path
\Product Management\Products\windream web portal
Filename
Size
Uploaded at
Common.bmp 798 KB 3/10/2005 11:46:25 AM
Fulltextextracted.bmp 798 KB 3/10/2005 11:46:25 AM
History.bmp 798 KB 3/10/2005 11:46:25 AM
Indices.bmp 798 KB 3/10/2005 11:46:26 AM
LifeCycle.bmp 798 KB 3/10/2005 11:46:26 AM
Rights.bmp 947 KB 3/10/2005 11:46:26 AM
Version.bmp 798 KB 3/10/2005 11:46:26 AM

Figure 36: The upload directory

The destination directory is displayed in the upper list. In the lower list, objects are listed which have currently be placed in the upload directory. Objects will be displayed with filesize, date, and time of the upload. All or single documents can be selected from this list in order to store them in **win**dream.

Via icon in column you can view the object properties of objects in the destination directory and edit them.

You can enter a comment in the respective field. The comment will then be saved in the history.

You can determine whether existing objects will be overwritten in the destination folder, or whether checked-out documents are to be checked-in again.

A further option is to create new versions when uploading files.

Click to store the selected objects in **win**dream.

The process is logged in the report window. A line with the filename, the status and an error description will be edited. If an error occurs, the entries will be displayed in the status and the error description column.

Index objects

Via the link in column *Destination Directory* or via the properties (icon *Properties*) in column , you can index the file, or you can view and edit the file properties.

Editing documents

Stored documents can be edited via **win**dream web portal pro. The modification of the original files is executed with the registered original application after a file download. Modified documents are stored in **win**dream again via upload.

When editing documents, copies of the respective documents can be ex- and imported from/into the DMS, they can be checked out and checked in again.

In addition to this, documents can also be locked for editing exclusively. This way, documents will be locked for other users and can be edited in the DMS directly. After having finished the document modification, the edit lock will be removed again.

Index data of documents and folders can be acquired for new objects or changed for existing ones (tab page *Indices* in the window of the object properties).

Further on, new versions can be created with **win**dream web portal pro. The administration of versions allows to administer current versions and previous versions.

The administration of rights allows the assignment of access rights on documents and folders on user and group levels (tab page *Rights* in the window of the object properties).

The histories of documents and folders in the **win**dream drive present a detailed overview on creation and modification date, which can be viewed and extended via tab page *History* in the window of the object properties.

Objects can be copied, moved, renamed or deleted from the database with the functions of the icon bar in **win**dream web portal pro.

In addition to the display of the fulltexts and the contents of fulltext-searchable index fields, further fulltexts for documents can be acquired manually.

Selection of documents and folders

The selection of documents and folders to be edited is either executed from the listview of the Explorer (icon) or from a result list which has been created with a search function of **win**dream web portal pro. Specific editing processes can be executed for several objects at the same time, while others can only be executed for one object at a certain point of time (for example renaming or all functions concerning properties). Documents and folders for which an action cannot be executed (as the requirements like access rights are not fulfilled) will be

excluded from editing. Respective notes can be found in the report window of **win**dream web portal pro.

Reporting editing processes (report window)

Specific editing processes will be logged. The result is displayed in a report window after having finished the process. Information on the type of process, the procedure and the status will be viewed. If errors occur, error descriptions will additionally be displayed.

Requirements for editing objects

Access rights

A basic requirement for all editing processes is that you have the necessary rights. A document can only be changed, if a user or the group to which he belongs has been equipped with the right of changing the document. This is also valid for changing index data, for creating new versions or for changing the rights.

Lock document for editing

Documents will be locked for being edited by **win**dream under certain circumstances. This ensures that only one user will get access for editing a document. All other users can only read the document during this period of time, but they cannot change it.

Indexing objects

When stored in the DMS, all objects will be equipped with object related index properties, like date, version, object type or keyword, according to which they can be retrieved in the database or in the **win**dream archive.

In this context, there is a differentiation between system properties which are valid for all objects in the Windows operating system, and the DMS-specific properties, for example object type and object type-specific index properties.

The system properties are automatically generated when an object is stored in **win**dream. The DMS-specific indexing is executed via tab page *Indices* in the object properties (icon).

You can index objects either directly after having acquired them in the DMS, or later. This means that index properties are added to the system-specific properties (assignment of an object type).

A post-indexing of documents or folders can be executed any time after documents have been stored in the DMS.

Additionally, already stored index information can be edited. This is only valid for object type-specific indices. An object type which has been assigned cannot be changed later.

A detailed description on indexing objects is presented in the description of the **win**dream Client named "**win**dream User Manual".

Acquiring or editing indices

In order to acquire or change indices, you open the object properties from a report window, in the listview of the Explorer or from a result list. Thus, click icon in column of the respective object. Then, you open the indices tab page.

The desired object type can be assigned to an object via the dropdown list box *Object Type*. After that, you enter the index data into the fields.

The index data of objects that have already been assigned to an object type can be edited. However, it is not possible to change the object type itself.

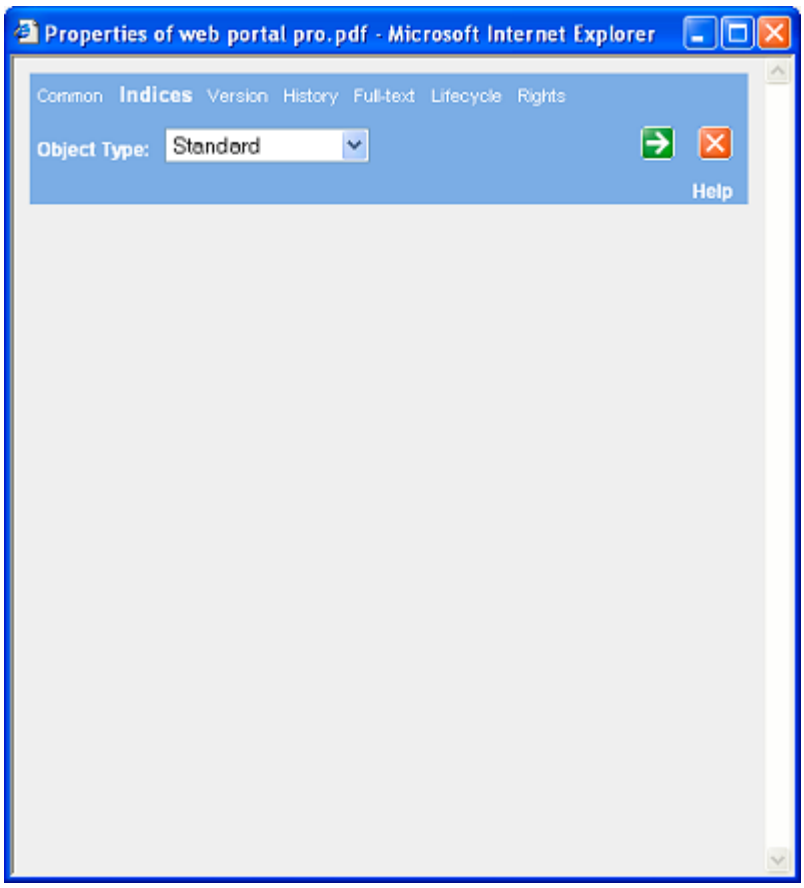

Figure 37: Indexing objects

The object type-specific index properties will be displayed in the window after having selected the object type. Depending on the object

type, the type, the number and the position of index fields may change. The indices can be placed on several tab pages. The respective pages are opened via the respective link for the tab. The number of tabs per line can be determined in the configurations.

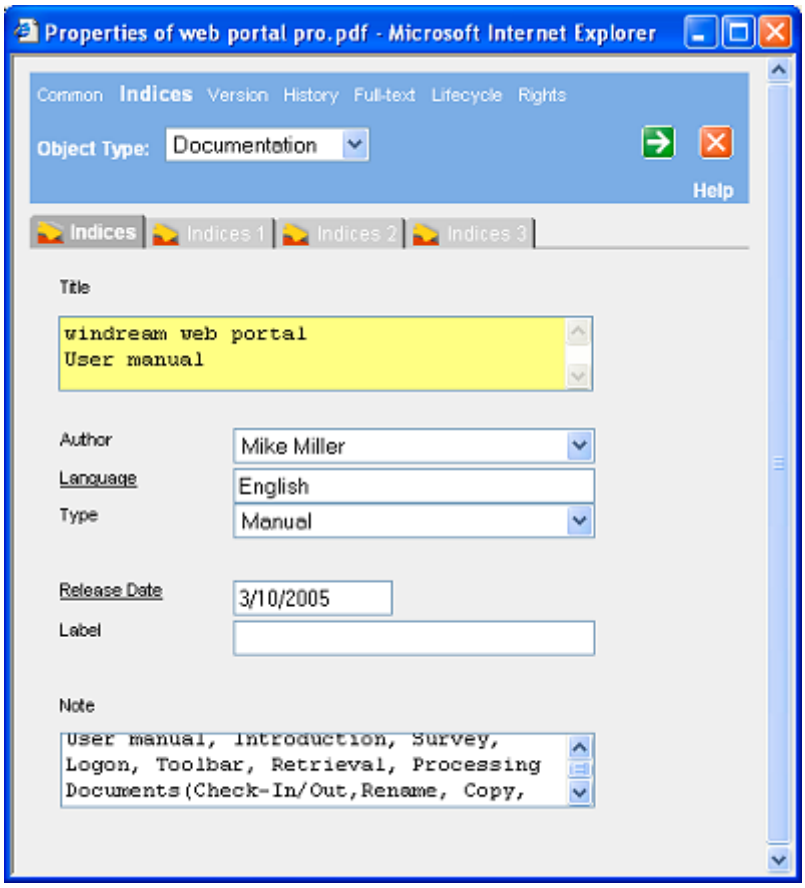

Figure 38: Indexing objects – enter index data

Enter the index data into the fields and save the data by clicking .

Input fields

Fields can also be alpha-numeric, numeric or date fields in which only specific entries can be made.

Mandatory fields

Input fields can be mandatory, meaning that an entry is required here. If those fields are not filled correctly, **win**dream web portal pro will display a respective message. Additionally, mandatory fields are equipped with a special color in the properties dialog.

Editable once

Input fields can also be defined as editable once only. In this case, you can only edit and fill the field once. Afterwards, the field will be in read-only mode. Later changes are not possible.

Fulltext fields

Input fields can be fulltext fields in which the text entered is acquired as extended fulltext. Via these index fields, you can make a retrieval with the respective fulltext search routines. Additionally, specific index fields can be marked as fulltext-searchable, independent of their assigned object type. The contents of these fields is additionally extracted as fulltexts and will be considered during a respective search.

Lists (tables)

Input fields can also be created as lists or tables. Entries can be acquired and edited line by line according to the data type of the table. New lines for further entries are added via the respective icons in the title bar of a list, or existing contents can be deleted. The lines marked in the *Add* column are applied as index data As input help, dropdown lists can be made available:

Lists, groups of radio buttons or checkboxes with multiselection

Documents can also be indexed via a selection of entries from listfields (comboboxes) or from groups of radio buttons and checkboxes. A multiselection is also possible, if it has been defined respectively. Dropdown comboboxes offer the opportunity to acquire further entries in addition to the existing ones.

Presettings or dropdown lists

As input help, fields can contain presettings, for example as dropdown lists from which entries can be applied.

How to index an object

1. Select the object for which you want to edit the index data (in a report window, in the Explorer listview or in a result list).
2. Click the *Properties* icon .
3. Switch to tab page *Indices*.
4. Select the object type from the dropdown list *Object Type*.
5. Enter the index data into the fields.
6. Click icon to save the entries.

windream rights

The administration of rights in **win**dream is based on the user and group concept of Windows NT. The NT users and groups and the group membership of users are determined in the Windows NT user administration. The classification of users and groups as **win**dream users and groups and their administration is executed over the **win**dream Management Console (WMC). A description of the user administration of Windows NT can be found in the **win**dream user guide.

The access rights of **win**dream users and groups (read, change, assign rights) to documents and folders are administered over the tab page *Rights* of the object properties.

The assignment of access rights is executed by assigning users and groups with the respectively set rights to selected documents and folders.

Access rights can be extended or restricted at the workstations. A requirement is that the user himself or a group in which he is a member has been equipped with the right of changing the rights on the respective object.

The rights assignment via **win**dream web portal pro is always executed for the currently selected object.

Rights on new objects

windream will first assign the rights of the parent folder to new documents (and folders). These rights can be extended or restricted later. If you change the rights on a folder in which documents have already been created, these changes will not be applied to these objects automatically.

Note: Documents stored in a folder on which a user or a group does not have reading access will be found in a search process, if the user / the group has the right of reading on the respective documents. These documents can be viewed from the result lists. They will not be displayed in the Explorer listview.

Editing rights

In order to view or edit the rights on an object, you open the object properties via icon and switch to tab page *Rights*.

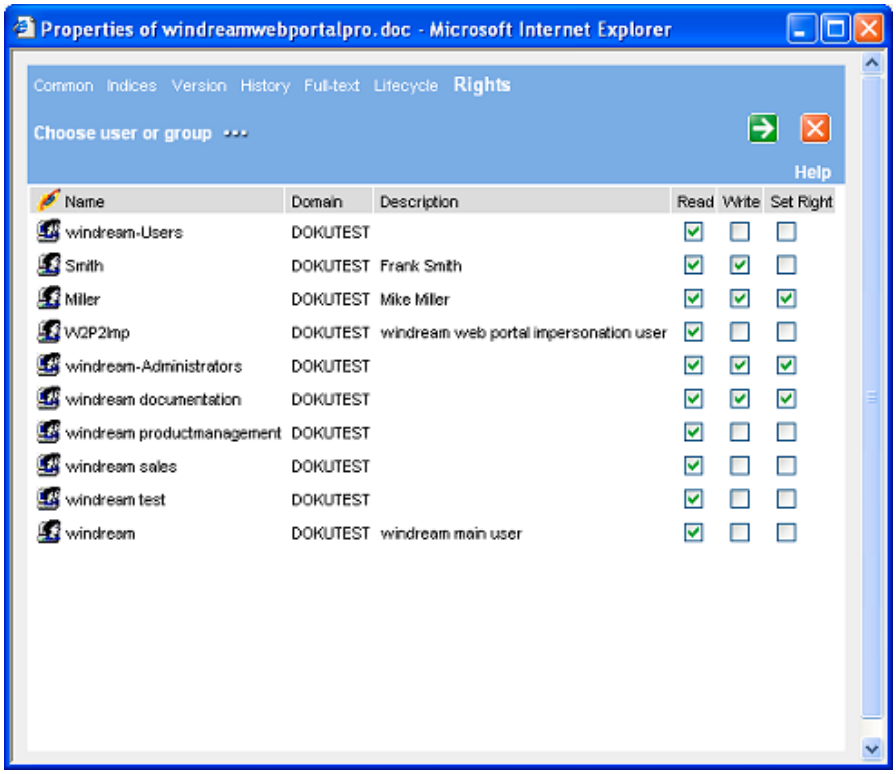
Properties of windreamwebportalpro.doc - Microsoft Internet Explorer
Common Indices Version History Full-text Lifecycle Rights
Choose user or group ...
Help
Name Domain Description Read Write Set Right
windream-Users DOKUTEST
Smith DOKUTEST Frank Smith
Miller DOKUTEST Mike Miller
W2P2Imp DOKUTEST windream web portal impersonation user
windream-Administrators DOKUTEST
windream documentation DOKUTEST
windream productmanagement DOKUTEST
windream sales DOKUTEST
windream test DOKUTEST
windream DOKUTEST windream main user

Figure 39: Administering rights – tab page *Rights*

The users and groups are listed with their assigned rights. They are at least equipped with the right of reading.

The icon in column *Group* indicates whether the entry represents a user or a group (user; group).

The login name for users and the group name for groups is presented in column *Name*. The complete user name is listed in column *Description*. The *Domain* column contains the name of the domain on which the user and group accounts have been registered.

Columns *Read*, *Write* and *Set Rights* are designed for displaying and assigning the respective rights. The respective right has been set, if the checkmark is enabled in one of the columns.

Note: At least one user or one group must have the right for changing rights and thus for reading in each folder of the **win**dream drive.

Assigning rights

You can change the rights on a document or a folder for all users and groups (also in groups which you are not assigned to), if you or a group you belong to has been equipped with the right of changing rights on the document / folder.

Assigning rights can be executed by:

- the assignment of users or groups with respective rights to the list of right holders via icon ... or
- the extension or restriction of rights of already assigned users and groups via checkmark on tab page *Rights*.

Adding users and groups

In order to add further right holders to an object, you select the object from the result list or from the Explorer listview via icon . Then, you open the object properties (icon) and click icon ... on tab page *Rights*.

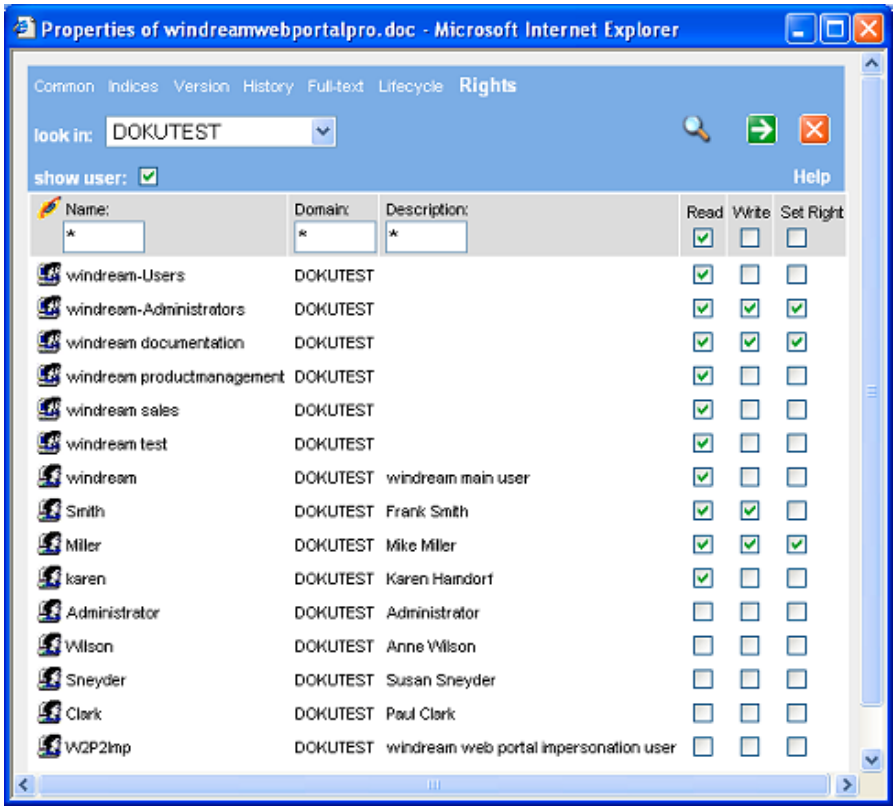

Figure 40: Select users and groups

Display user groups

The domains of the NT Server are displayed in the dropdown list box *Look in*. The list contains the **win**dream Server and all domains that are known to the **win**dream Server (see also topic "User and Group Administration" in the **win**dream user manual).

The list can be restricted to a selected number of users and groups by choosing a domain. After a search, which is executed via icon , the user groups registered on the selected domain will be displayed.

Show user

This checkmark decides whether all users registered on the domain are displayed in addition to the groups (checkmark enabled). As default, the checkmark is disabled.

> **Note:** The time needed for searching and displaying the users depends on the number of registered user accounts.

Filtering function

The filtering function will further restrict the contents of the list. When entering a value in the column headers, the list will only show elements that correspond to the value. Values can be entered in several columns in order to restrict the list. You can enter alphanumeric characters. Wildcards (* and?) are supported. Entering * will find all available elements of a column.

Execute the filtering process by clicking after having entered a value.

Select users and groups and assign rights

Clicking the button will add the users and groups including the assigned rights to the list of right holders on tab page *Rights* of the object properties.

If you select a user or a group who / which has already had rights on the documents or folders, he / it will get the currently assigned rights.

Save access rights

Changed access rights are saved via icon on tab page *Rights*.

How to add a new user / a new group

1. Select the object to which access rights for new users or groups shall be assigned in the Explorer listview or in a result list.
2. Click the *properties* icon .
3. Switch to tab page *Rights*.
4. Click the icon for selecting users and groups .
5. Select the desired domain in dropdown list box *Look in*.
6. Enable checkmark *Show user*, if all users of the selected domain shall be displayed in addition to the groups.
7. Click .
8. Enable the checkmarks for the rights of users which shall be assigned.
9. Click to apply the users and groups into the list of right holders.

10. Click to save the changed access rights.

Removing users and groups

Assigned users and groups can be deleted by removing all their rights on tab page *Rights*. After that, you save the changes via button . The respective users and groups will be removed from the list of right holders.

Note: At least one user or one group must always have the right for assigning rights and thus the right of reading each folder / document in the **win**dream drive. If you try to disable all rights for all users and groups, **win**dream web portal pro will display a respective message.

Editing rights of assigned right holders

You can change the existing access rights of users and groups on an object. The restriction or extension of rights of already assigned users and groups is executed via the checkmarks on tab page *Rights*.

Creating a new version

In **win**dream web portal pro, you can create new versions of documents. This function (icon) will first create a copy of the document with a version number "+1". The copy is stored in the same directory as the original document, with the same name, rights, history, and properties. The fulltext will be regenerated for the new version.

The creation date and a message displaying that this version was created from a previous version will be entered as first entry of the history.

The file attribute *Hidden* is attached to the previous version, and it will be set into the read-only mode. An entry with information on user, date, and time of the new version will be added to the history of the previous version. Previous versions cannot be changed any more.

In order to be able to create a new version, you must have the right for changing the document. A new version cannot be created from a previous version.

The current version, the version number, and the previous versions of a document can be viewed via tab page *Version* of the object properties using icon .

In order to create new versions of files, you select the desired objects in the Explorer listview or in a result list and click icon in the icon bar.

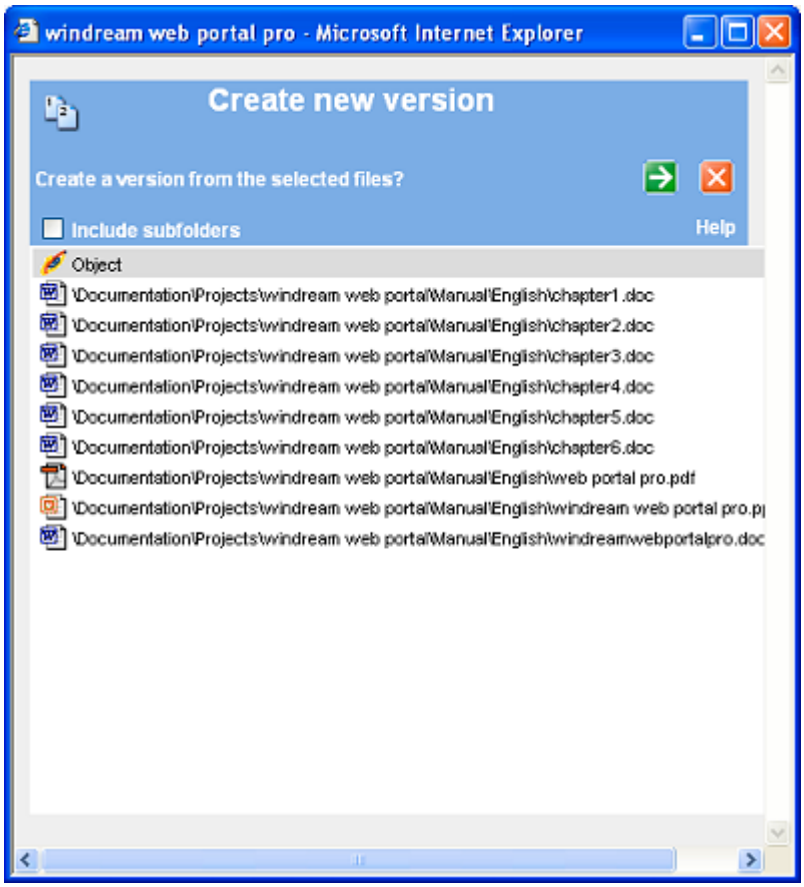

Figure 41: Create new version

The selected objects are displayed in the list. The properties of the selected objects can be viewed and edited via icon in column .

It is possible to include subfolders when enabling the respective option.

New versions are created after having clicked icon .

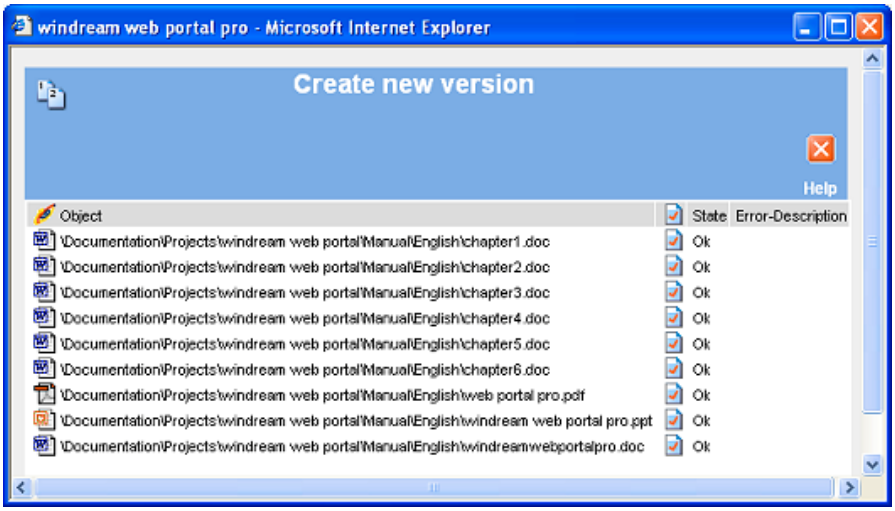

Figure 42: Create new version - report

The process is logged in the report window. A line with the filename, the status, and an error description will be edited. If an error occurs with one of the objects to be processed, a respective message will be displayed in column *Error description*. The report window can be closed by clicking .

How to create a new version

1. Select the documents for which a new version shall be created in the Explorer listview or in a result list.
2. Click the icon for creating a new version .
3. Enable checkmark *Include subfolders* (optional).
4. Click icon in window *Create new version*.
5. Close the report window with icon .

New version on check-in

It is possible to determine the automized generation of new versions when documents are checked in.

On the one hand, it is possible to determine the automatic creation of a new version on check-in, if this option has been set in the WMC for documents of a certain object type.

On the other hand, the option can also be set manually for documents of a different type on check-in. Detailed information can be found in the descriptions of the **win**dream user manual.

New version on file import

New versions can also be created when new files are imported (uploaded).

Check-in and check-out documents

The Check-Out/Check-In function of **win**dream web portal pro allows to check-out documents from **win**dream to a selected data carrier via download and to check them in again after having finished the editing process. Checked-out documents are only available for the user who executed the check-out process.

During a check-out process (function), copies of the original files will be created in the check-out directory of the data carrier. The original documents in the DMS will be locked. Other users can only read the documents as long as they remain checked-out. Documents locked are displayed in red letters in the listview and are marked as locked in the respective column.

Note: Only the contents of a document that is checked-out can be changed. You cannot change DMS-specific properties (like indices, rights).

During the check-in process (icon), the original files in **win**dream will be substituted by the modified files, the write protection mode will be removed, and the documents will be available again for other users.

You can also undo a check-out process to cancel the changes you have already made (icon). The original file in the DMS will not be substituted by the checked-out file, and the read-only mode will be removed.

Entries are written in the history for each check-out and check-in process of any document, containing information on user, date, time, and a comment (optional).

Requirements

The check-out function can only be applied for documents and folders which are not locked and on which you have the right of changing.

Read-only documents cannot be checked out, either. Nevertheless, in order to also check out documents for which the read-only filesystem attribute has been set, you will have to enable the option for ignoring read-only flags during the check-out process.

Check-out documents

The selection of documents to be checked-out is executed in the Explorer listview or in the result list after a search. Single or several documents can be checked-out via icon .

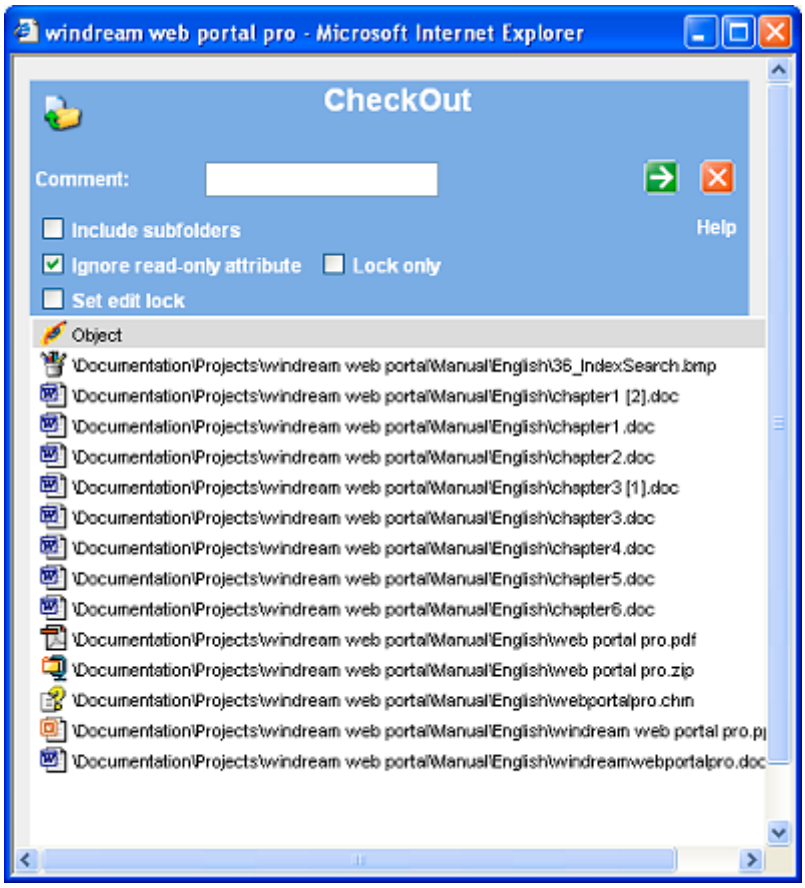

Figure 43: Check-out objects

In the comment field you can enter a personal comment concerning the check-out process or reason. This comment will be saved with the respective entry in the history.

Via option *Include subfolders* it is possible to check-out complete folders recursively. The check-out function will then be applied to the documents within all subfolders. Directories will not be checked-out.

Note: The time needed for the download and the following upload on check-in depends on the number and the size of the selected files.

If also read-only documents shall be checked out (filesystem attribute set), you will have to enable the option for ignoring the read-only mode.

The option to only lock documents enables you to lock documents in **win**dream without downloading them. The undo check-out function will remove the lock and the documents can be edited by other users again.

Enable the option of the edit lock, if you want to edit selected documents. The function corresponds to that of the list of further functions which can be viewed in the navigation bar (see also chapter "Toolbar" in the configurations, p. 105). A detailed description can be found in chapter "Set edit lock for documents", p. 78.

The object properties of the objects determined for being checked out can be viewed via the icon in column .

Click and execute the download process from the following site.

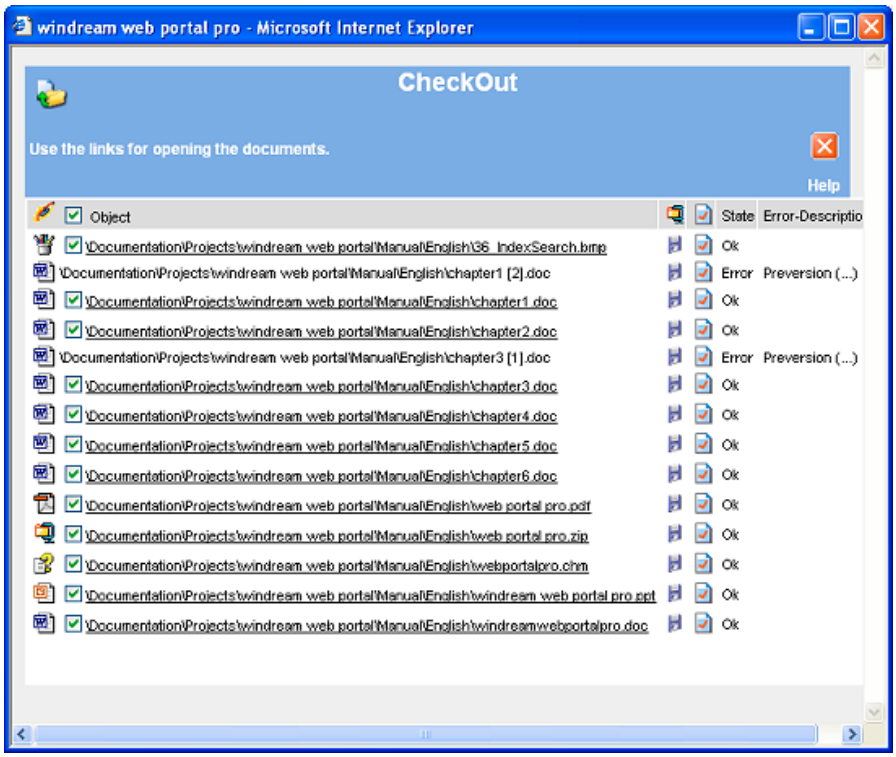

Figure 44: Check-out Objects - execute download

The selected objects are listed. A line with the filename, the status and an error description is displayed for each file to be checked out. If a file cannot be checked out (for example due to missing rights), respective entries will be edited in the status and the error description columns of the objects.

You can edit and view the object properties via icon in column .

Documents to be checked out can either be separately downloaded via the link on the filename or via icon ; or you collect several files for compressing them as a ZIP file via icon ; .

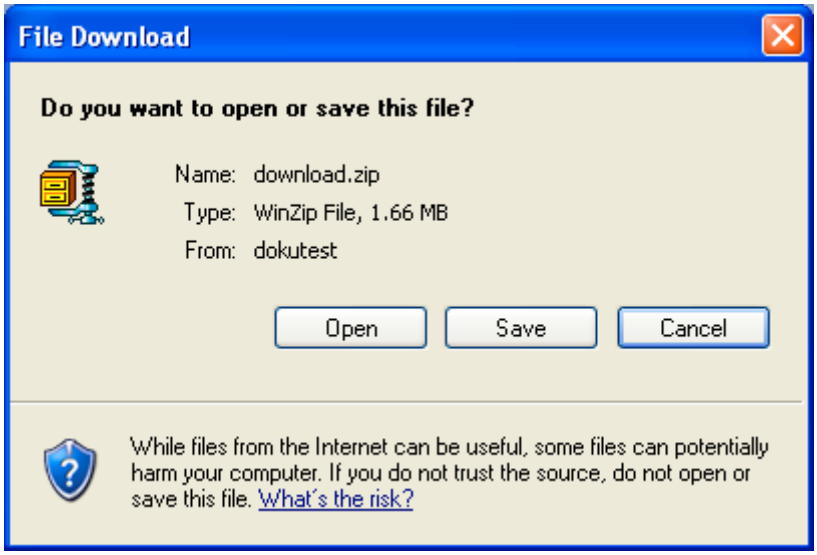
File Download
Do you want to open or save this file?
Name: download.zip
Type: WinZip File, 1.66 MB
From: dokutest
Open
Save
Cancel
While files from the Internet can be useful, some files can potentially harm your computer. If you do not trust the source, do not open or save this file. What's the risk?

Figure 45: Checking objects out – download completed

Note: By default, all documents to be checked out are highlighted and will automatically be zipped in a `ZIP`-file before being downloaded.

In the configurations you can determine different options for downloading files (see chapter "Configuration", p. 101).

Here, you also determine the maximum number of files to be compressed in a ZIP-file and the maximum size of all selected documents. If a download cannot be executed for all documents due to the current document size, the application will generate a respective logfile. In this XML-file, all documents are listed for which a download could not be executed (up to 100 entries are possible).

Check-out process completed

If the check-out process has been completed successfully, you can edit the files and check them in into the DMS again.

Checked-out documents can be retrieved with the index search via the indices *Checked-out* or *Checked-out by*.

In the Explorer listview or in the result list, checked-out documents can be recognized by red letters and a respective icon in column *Locked*, if the listview has been extended by this column. The listview columns can also be extended by the columns named Checked-out and Checked-out by (see chapter "Configuration", p. 96).

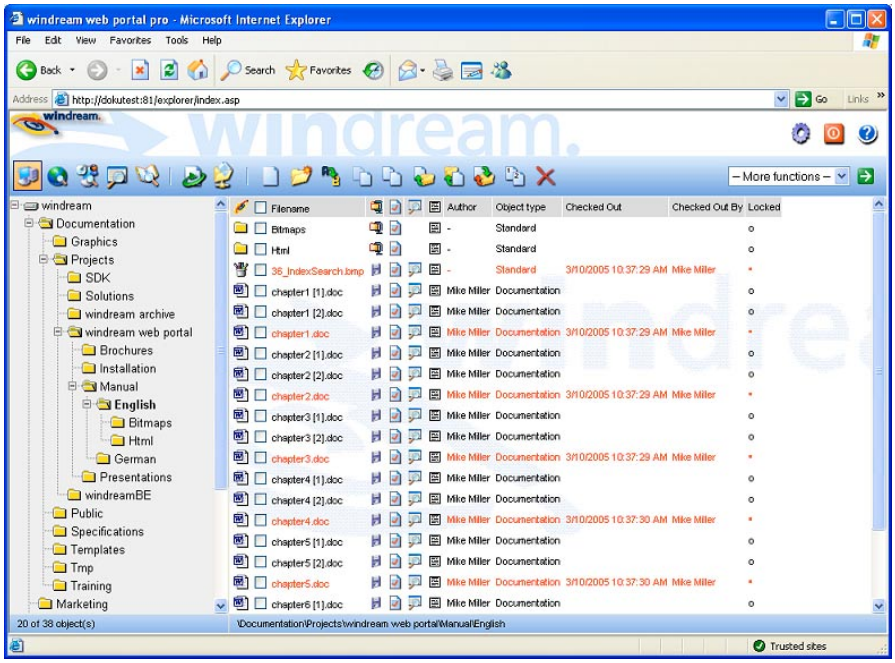

Figure 46: Presentation of checked-out documents in the explorer listview

How to check-out documents

1. Select the objects to be checked-out in the Explorer listview .
2. Click icon *Check out* .
3. Enter a comment in window *Check-out* (optional).
4. Enable checkmark *Include Subfolders*, if folders shall be checked-out recursively.
5. Check the box for ignoring the read-only mode, if also documents shall be checked out for which the read-only flag has been set.
6. Click .
7. Select the documents in the *Check-out* window and either click on the link or the icon (single file) or icon (several files).
8. Execute the file download via the respective dialog window.

The selected documents will be checked out into the determined local directory and can be edited there.

Check-in documents

The check-in process is executed via icon . Documents to be checked in are selected in the Explorer listview or in a result list after a retrieval. When using the check-in function , documents will be checked in file by file.

Documents can only be checked in by the user who checked them out previously. A check-out process executed by other users can be undone by a system administrator via the **win**dream Management Console. In this case, changes will not be stored. Further information can be found in the **win**dream user manual.

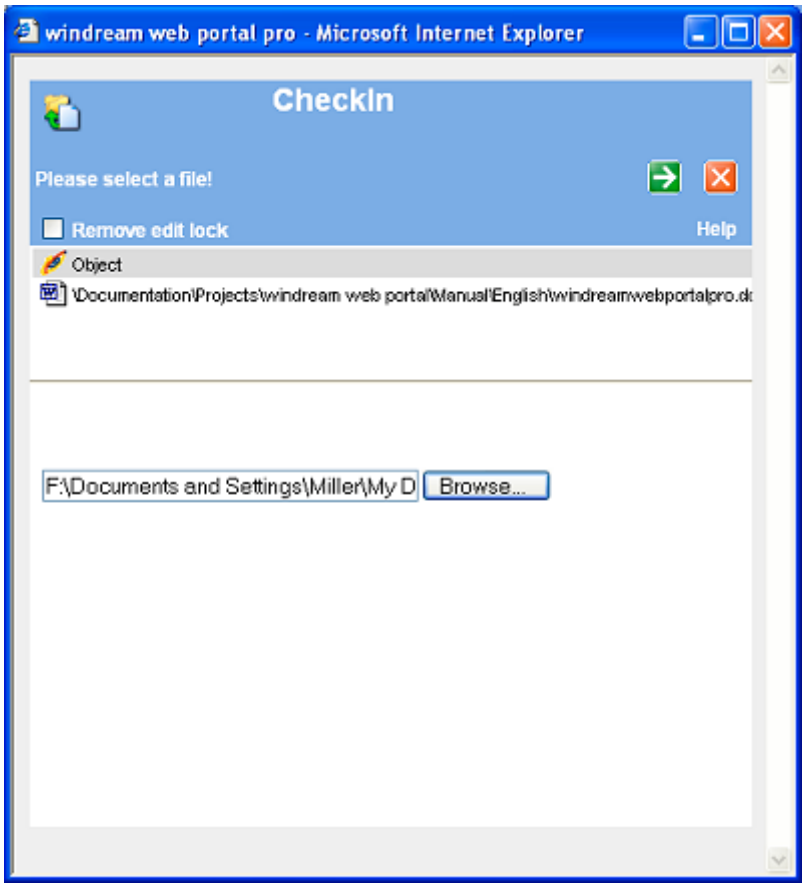

Figure 47: Check in objects – select file

The file to be checked in is displayed in the list. The properties of the object can be viewed when clicking the properties icon in column .

The file to be checked in is selected via the browse button.

Click to determine the check-in options on the following site.

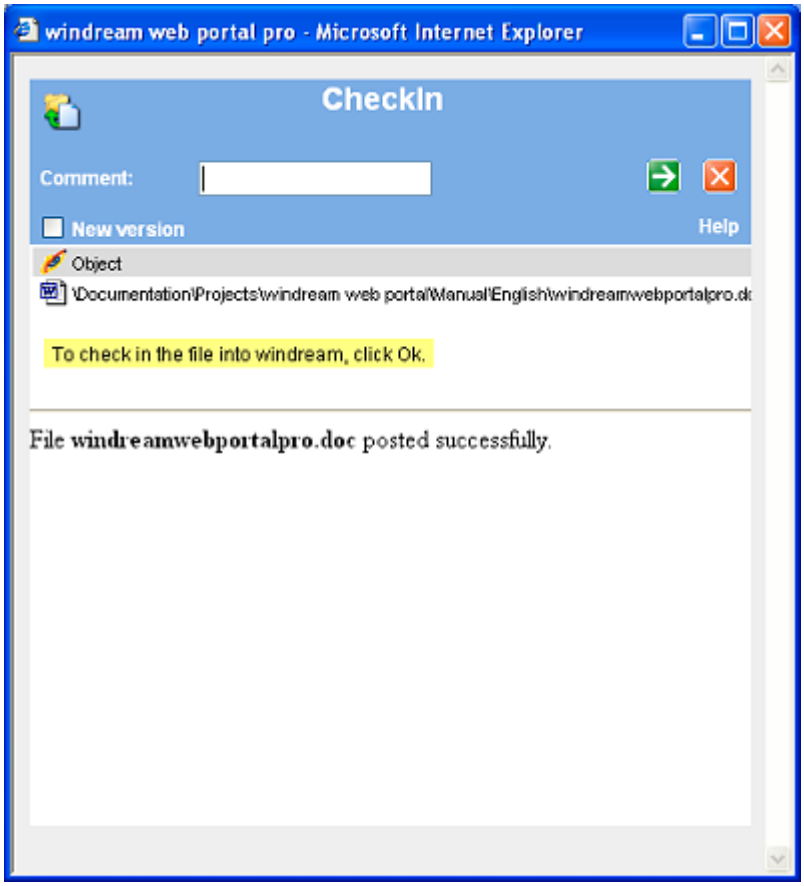

Figure 48: Check in objects – upload

You can enter a personal comment in the respective field. This entry will be added to the document history.

A further option is to create a new version during the check-in process.

Click to upload the file.

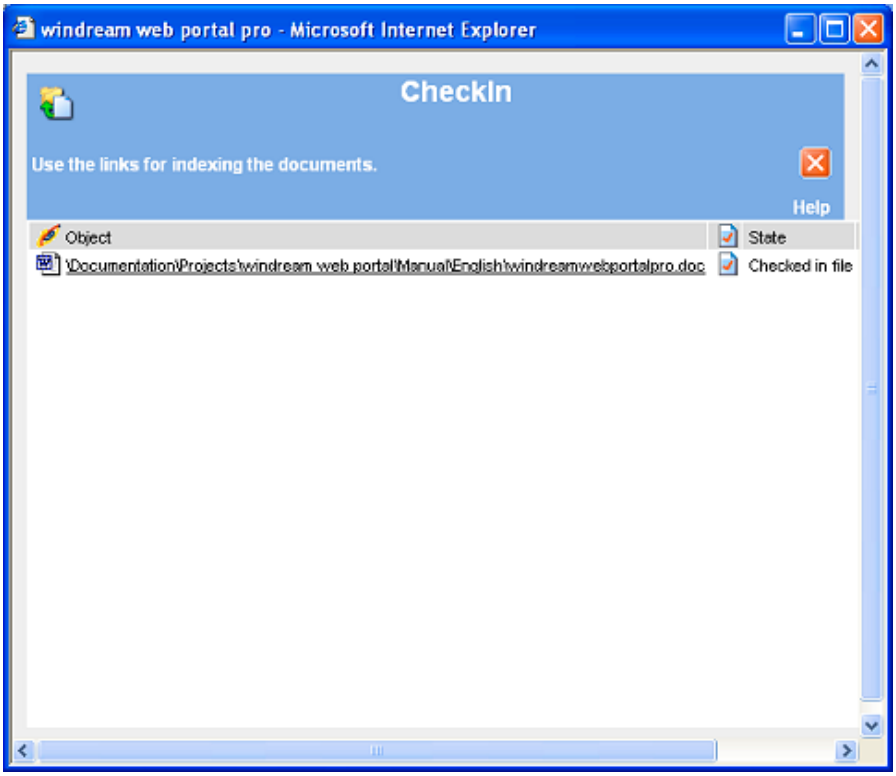

Figure 49: Check in objects – report

The process is logged in the report window. A line with the filename, the status, and an error description will be edited. If an error occurs with one of the objects to be checked in, a respective message will be displayed in column *Error description* and in the status column.

The files can be indexed via the link in the object column or via the properties in column . You can also view and edit the file properties.

How to check in documents

1. Select the object to be checked in from the Explorer listview or in a result list.
2. Click the *Check-in* icon .
3. Select the file to be checked in via the *Browse* button.
4. Click .
5. Enter an optional comment in the *Check-in* window.
6. If you do not want to overwrite the documents in the DMS by the checked-in copy, enable the *New Version* button.
7. Click .
8. Close the report window via icon .

Undo check-out

Documents for which a check-out process shall be undone are selected in the Explorer listview or in the result list after a retrieval process. The *Undo* icon will undo the check-out of one or several documents.

This function can only be applied for documents which have been checked out by yourself. Check-out processes previously executed by other users can be undone by a system administrator only via the **win**dream Management Console. Please read further information in the **win**dream Client description.

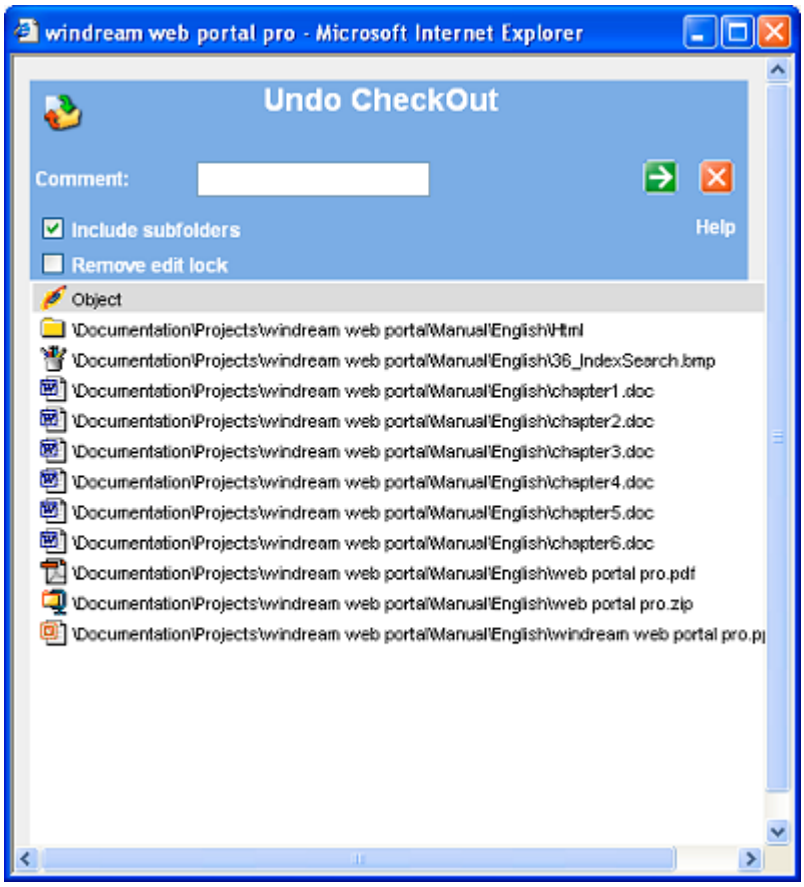

Figure 50: Undo Check-out

You can enter a personal comment on the check-out process in the respective field. The entry will be added to the history.

It is also possible to execute the undo function recursively for subfolders, if the respective checkmark is enabled.

You can view the object properties via icon in column .

Click and execute the process on the following site.

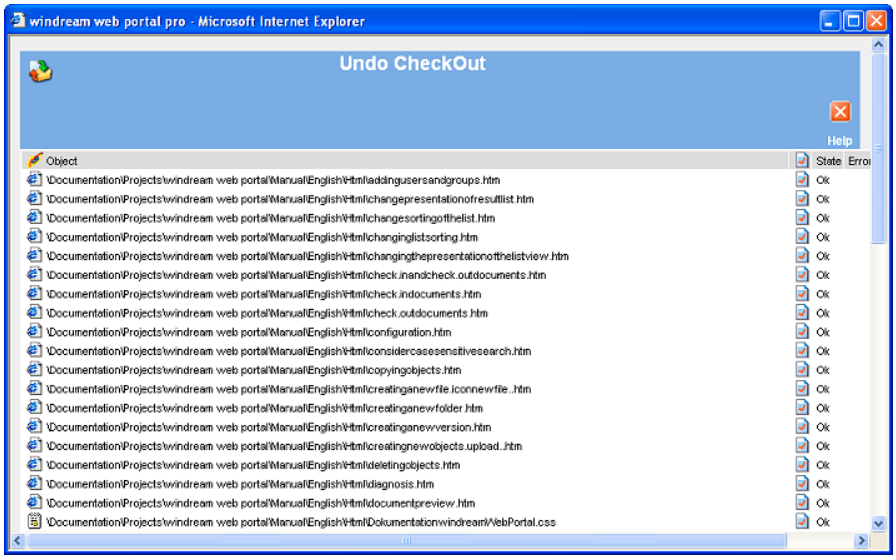

Figure 51: Undo Check-out - report

The process is logged in the report window. A line with the filename, the status, and an error description will be edited. If an error occurs with one of the objects to be processed, a respective message will be displayed in column *Error description* and in the status column.

Via the properties icon in column you can view and edit the object properties, for example the indices or the access rights.

How to undo a check-out process

1. Select the objects for which the check-out shall be undone in the Explorer listview or in a result list.
2. Click the *Undo* button .
3. Enter an optional comment in the *Undo Check-Out* window.
4. Enable the checkmark for including subfolders if the process shall be executed recursively.
5. Click .
6. Close the report window by clicking .

Setting the edit lock

With this function, **win**dream web portal pro enables users to exclusively edit documents in the DMS (original files, index data and document properties). Documents will be locked for other users, the documents can be editrd in the DMS directly and can be unlocked again after the editing process has been completed.

Documents with the edit lock flag will only be available to the specific user who has locked them for editing. Other users can only the read the

documents. The edit lock can be removed, if the editing process has been completed.

The *Set edit lock* and the *Remove edit lock* functions correspond to the same entries in the list of further functions, which can be viewed in the navigation bar (see also chapter "Toolbar" in the configurations, p. 105).

Note: In contrast to an editing process executed via check-out function, documents which are changed this way cannot be undone.

Prerequisites

A requirement for editing is that you can access the DMS via an Intranet and that you have entered the UNC-path in the configurations (on the site for general settings), via which the Client has been connected to the **win**dream drive (see also topic "Miscellaneous" in the configurations, p. 104).

Editing documents via the Internet is not possible with this function. The editing function can only be used for documents which have not been locked and on which you have the right of changing. In order to edit documents for which the read-only flag has been set, you will have to enable the option of ignoring the read-only mode.

Set and remove edit lock

The selection of documents is executed in the Explorer listview of **win**dream web portal pro (icon) or in the result list after a search. A single or several documents can be edited with a lock using the respective command from the list of further functions or via the check-out window ( ).

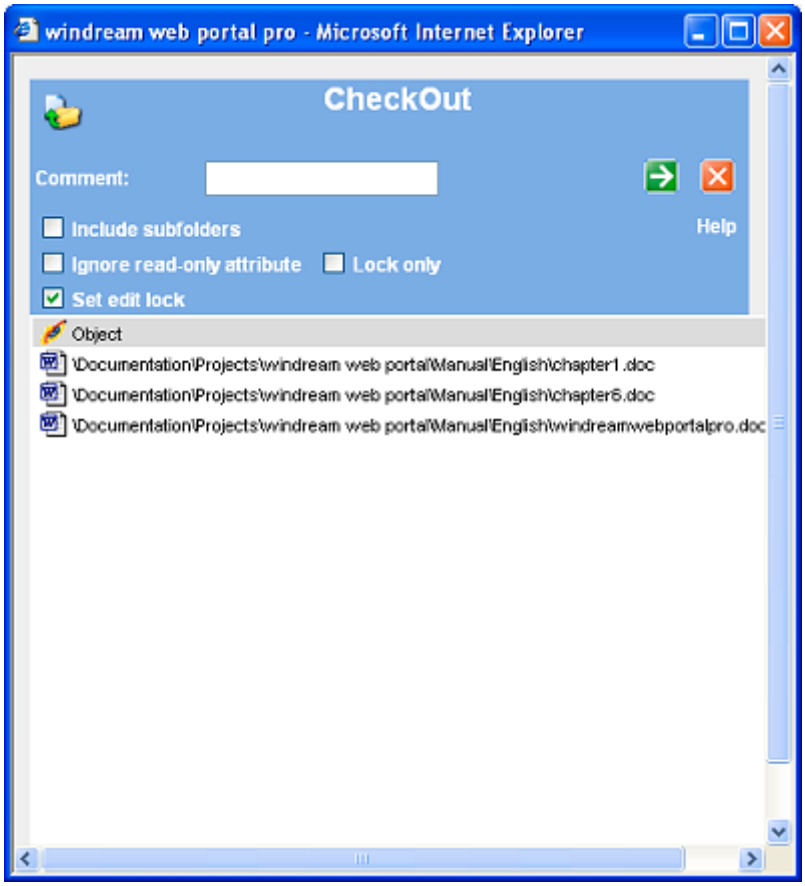

Figure 52: Setting the edit lock for documents

You can enter a comment in the respective field. It will be saved with the respective entry in the history. It is possible to set the edit lock for complete folders recursivley (including subfolders) via the respective option. In this context, the function will exclusively be applied to the documents in the directories. Only documents will be locked for editing, not the directories.

If the edit lock shall also be set for read-only documents (read-only file property has been set), you will have to enable the option for ignoring the read-only mode.

With the option to only lock the documents you can lock documents in **win**dream without dowenloading them. The function to undo a check-out will remove the lock again, and other users will be able again to edit the documents.

Via the properties icon in column you can view the object properties of objects which have been selected for this process.

Click and download the selected documents on the following site.

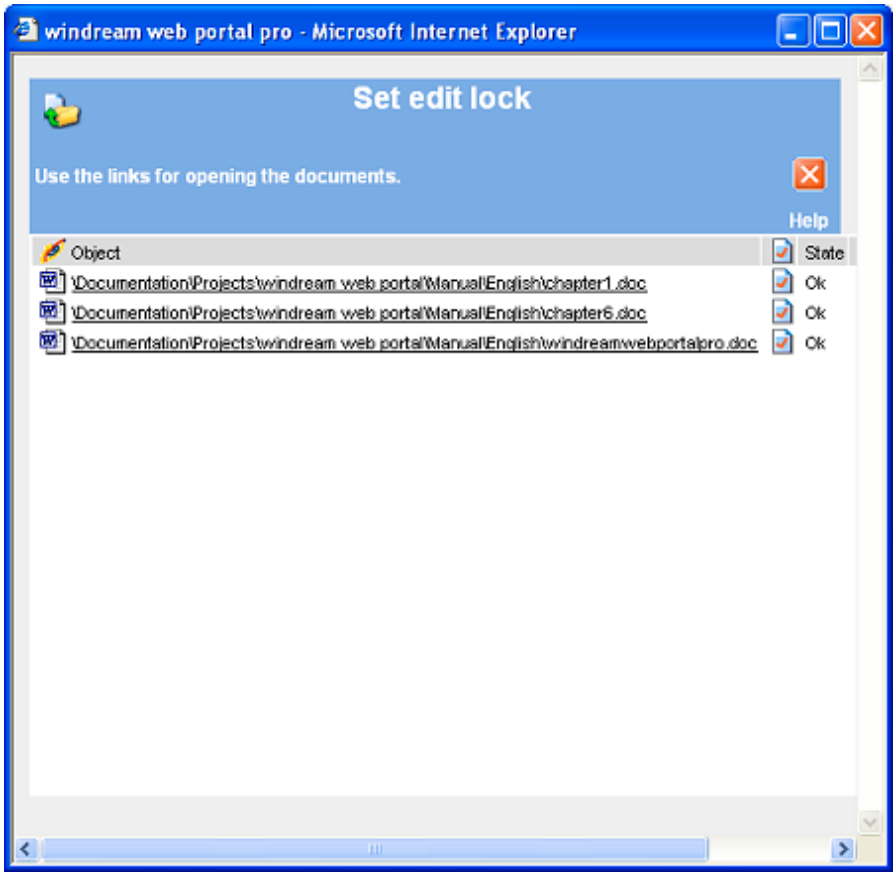

Figure 53: Open a document for editing

The documents selected will be listed. For each file to be edited, a line with nthe filename, the status and an error description will be displayed. If one of the selected files cannot be locked for editing (e.g. no right or file has already been checked out), respective entries will be made for the object in the status and error description columns.

You open the file in its originally associated application with a click on the link. You can edit files and remove the edit lock again afterwards.

With the index search you can retrieve the documents which have been locked for editing via the flags and editor indices.

In the Explorer listview or in the result list, you can identify the documents which are locked for edting by the green presentation. In order to detect the user who locked documents for editing in the Explorer listview, you can extend the columns by the flags and the editor columns (see chapter "Configuration", p. 95).

How to set the edit lock for documents

1. Select the objects to be edited in the Explorer listview ( ) or in a result list of **win**dream web portal pro.

2. Click the *Check-out* icon .
3. Check the box to *set the edit lock*.
4. Enter an optional comment in the *Check-out* window.
5. Click the option to *include subfolders*, if you want to execute the functions recursively for documents in subfolders.
6. Enable the option for ignoring the read-only mode if desired.
7. Click .
8. In the *Set edit lock* window, click the links to open the documents for editing.

Remove edit lock

Removing the edit lock is executed via the respective command from the list of further functions or via the *Check-in* window. The selection of documents is executed in the Explorer listview ( ) or in a result list after a search.

The documents can only be unlocked by the specific user who had set the edit lock before. documents which had been locked by other users can be unlocked by a **win**dream system administrator via the **win**dream Management Console. Changes which have already been made will be applied. A detailed description of the administrative functions in the WMC can be found in the **win**dream user manual.

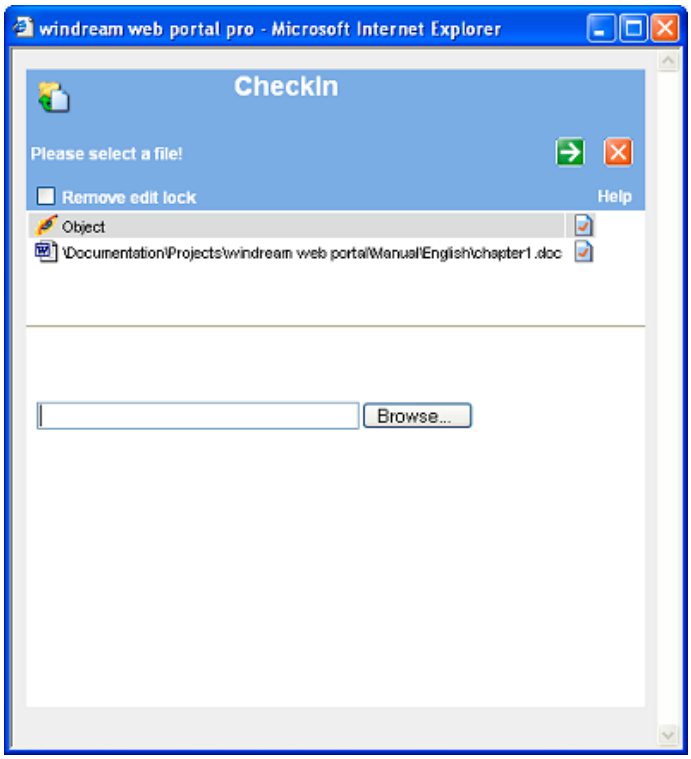

Figure 54: Remove edit lock

Check the box to remove the edit lock.

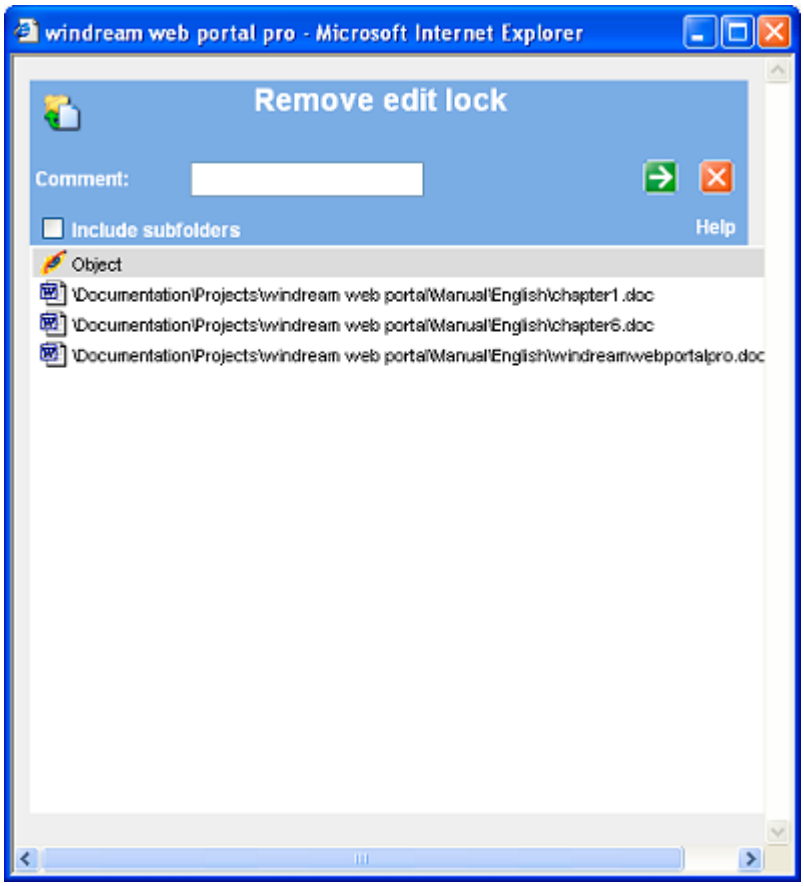

Figure 55: Remove edit lock

Enter an optional comment in the *comment* field. The comment will be saved in the document history.

Via the option to *include subfolders*, you can finish the editing process recursively for all documents in the subdirectories of the currently selected folder.

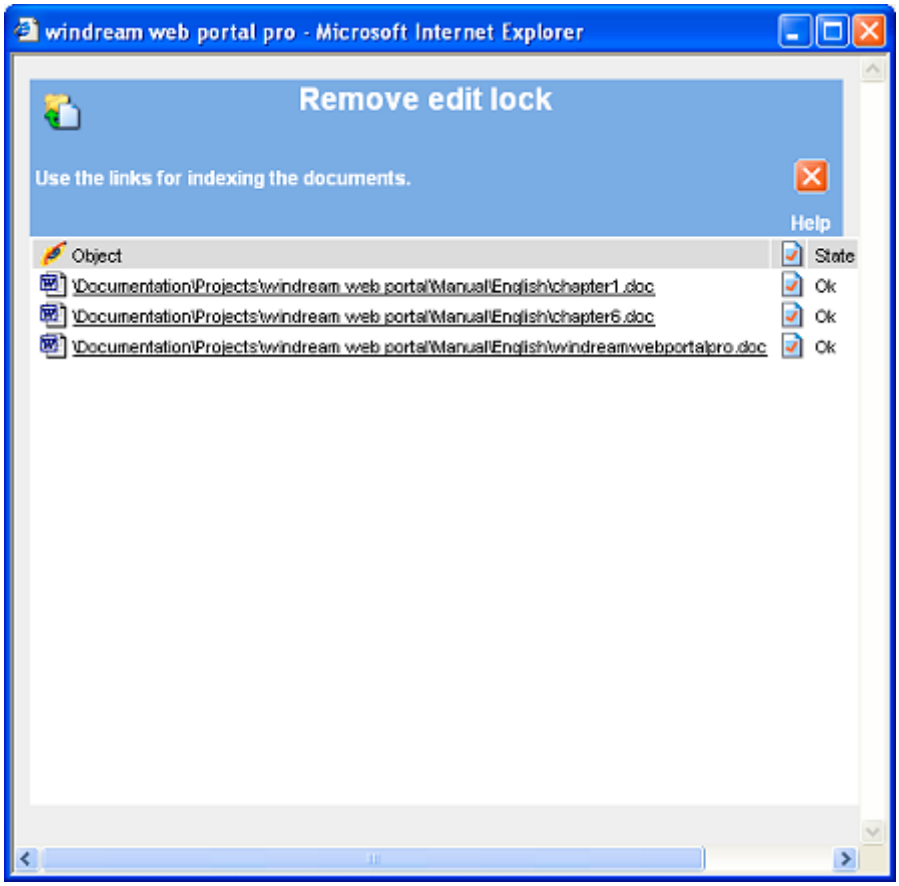

Figure 56: Edit lock removed

Copying objects

Files and folders can be copied. Select the desired objects in the Explorer listview or in a result list and click the *Copy* icon in the icon bar.

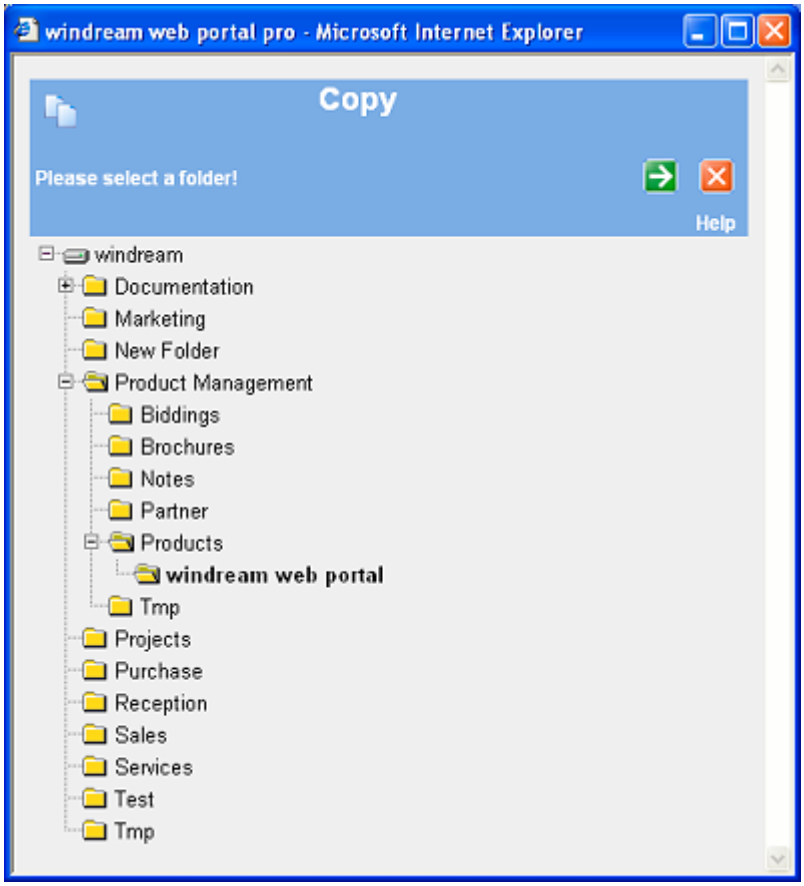

Figure 57: Copying objects – select destination folder

At first you determine the destination folder (target path). On the following site, you copy the selected objects to this folder.

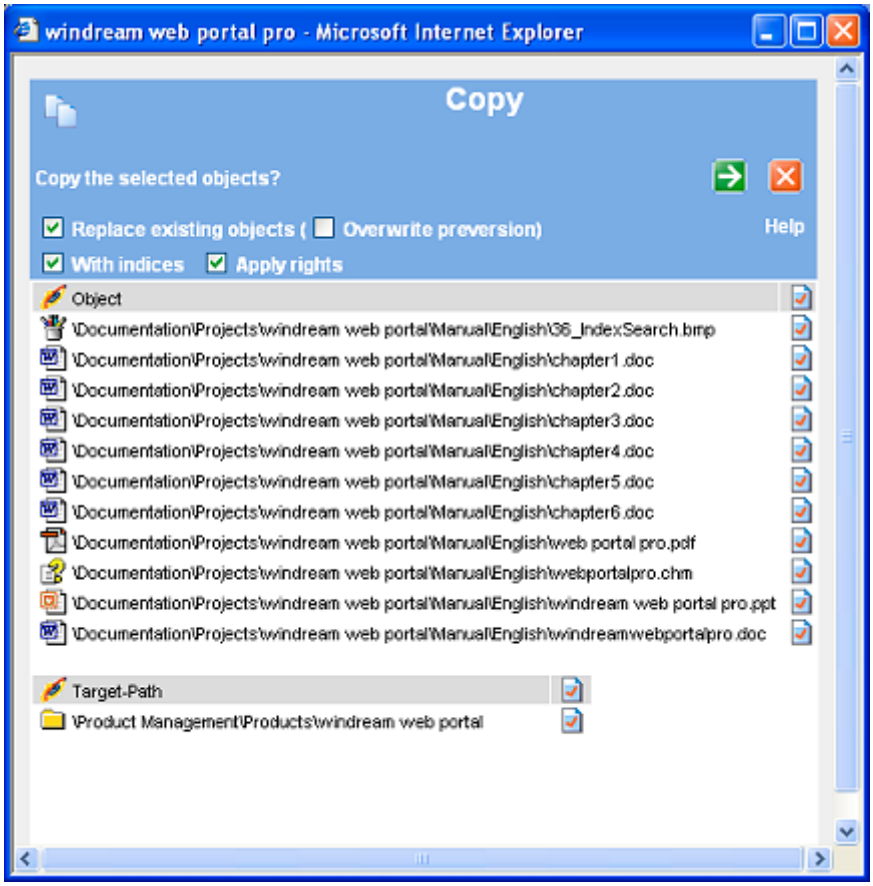

Figure 58: Copying objects

The objects are listed in the upper list. The lower list presents the destination directory (target path). Via the properties icon in columns you can view and edit the object properties of the selected objects and the determined target path.

Checkmark *Replace existing objects* determines whether existing objects shall be overwritten in the target path or not (disabled). In this context, you casn also decide whether possibly available previous document versions shall be overwritten (option *Include previous versions*). In order to copy files including index data, you select the respective option. Via the option to apply the rights, you can set that access rights will also be taken over.

Selected objects are copied via icon .

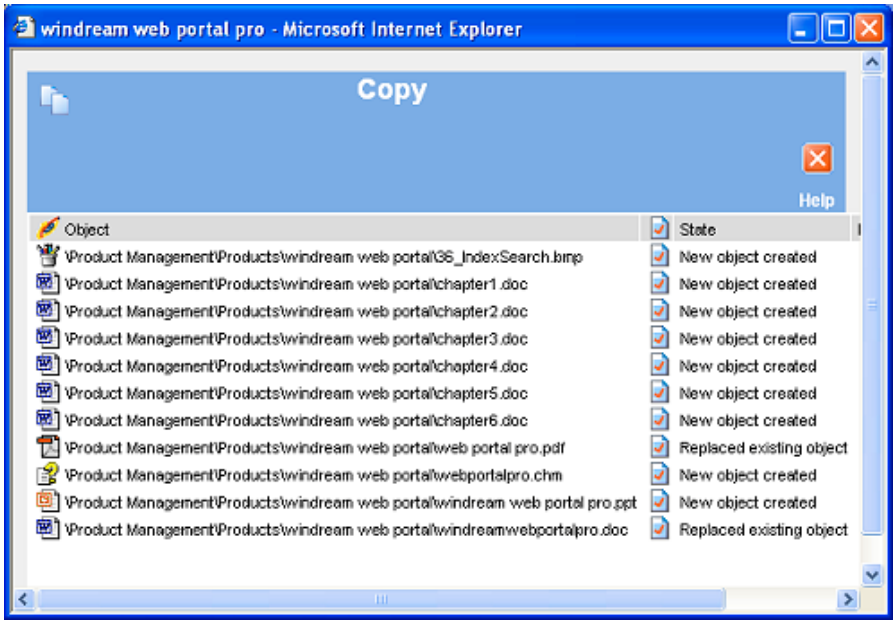

Figure 59: Copying objects - reporting

The process is logged in the report window. A line with the filename, the status, and an error description will be edited. If an error occurs with one of the objects to be processed, a respective message will be displayed in column *Error description*. The report window is closed via the icon.

Via the properties icon in column you can view and edit the object properties, for example the indices or the access rights.

How to copy a file / a folder

1. Select the objects to be copied in the Explorer listview or in a result list.
2. Click the *Copy* icon.
3. Select the target path in the *Copy* window.
4. Click.
5. Enable the checkmark for replacing existing objects, if existing objects shall be overwritten in the target directory.
6. Select the option to include previous versions if previous versions shall also be replaced.
7. Enable the option *With index data*, if you want to copy the files with associated index data.
8. In the *Copy* window, click to copy the selected files to the target directory.
9. Close the report window via icon.

Moving objects

Files and folders can be moved by selecting them in the Explorer listview or in a result list. Then, you click the *Move objects* button in the icon bar.

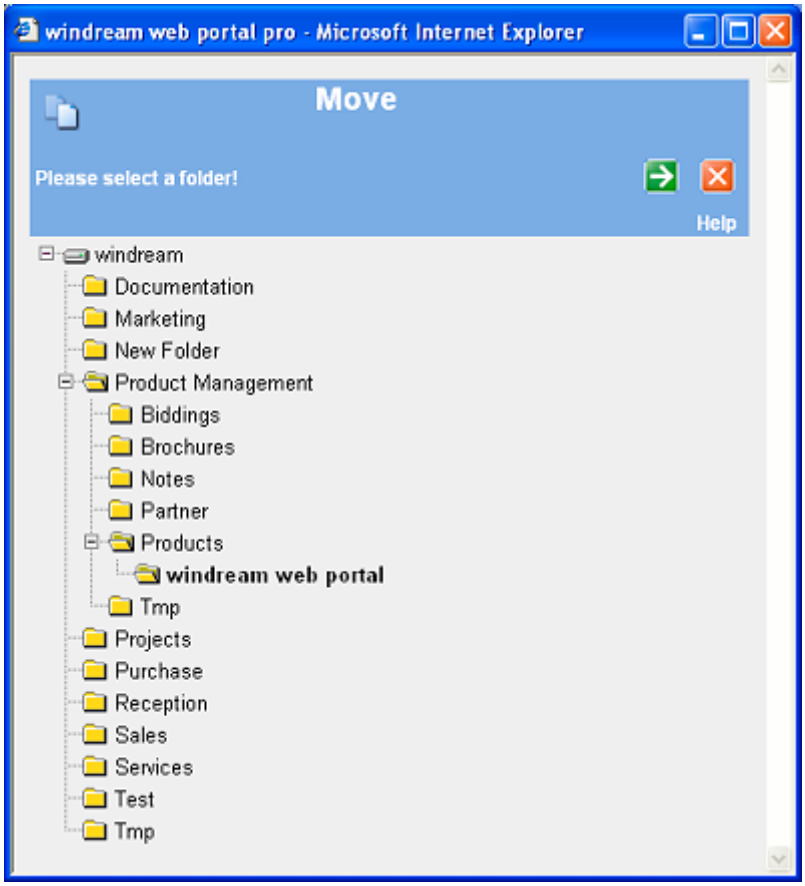

Figure 60: Moving objects – determing the target path

At first you determine a target path. On the following site, you move the selected objects.

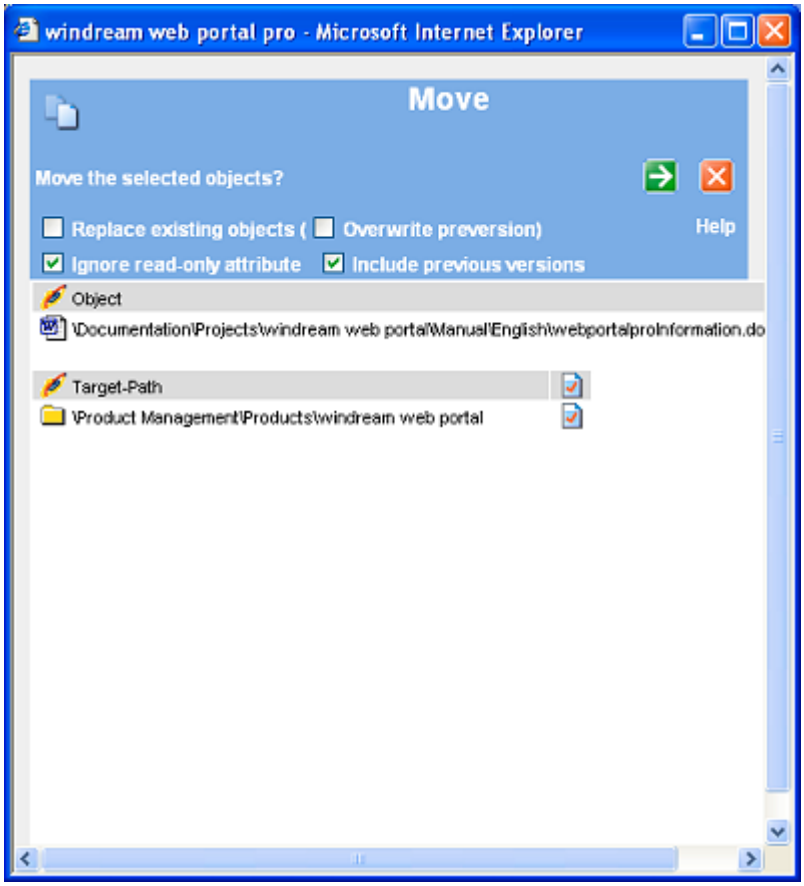

Figure 61: Moving objects

The objects are listed in the upper list. The lower list presents the destination directory (target path). Via the properties icon in columns you can view and edit the object properties of the selected objects and the determined target path.

Checkmark *Replace existing objects* determines whether existing objects shall be overwritten in the target path or not (disabled). In this context, you casn also decide whether possibly available previous document versions shall be overwritten (option *Include previous versions*). In order to copy files including index data, you select the respective option. Via the option to include index data you can set that indices will also be moved with the documents.

Selected objects are moved via icon .

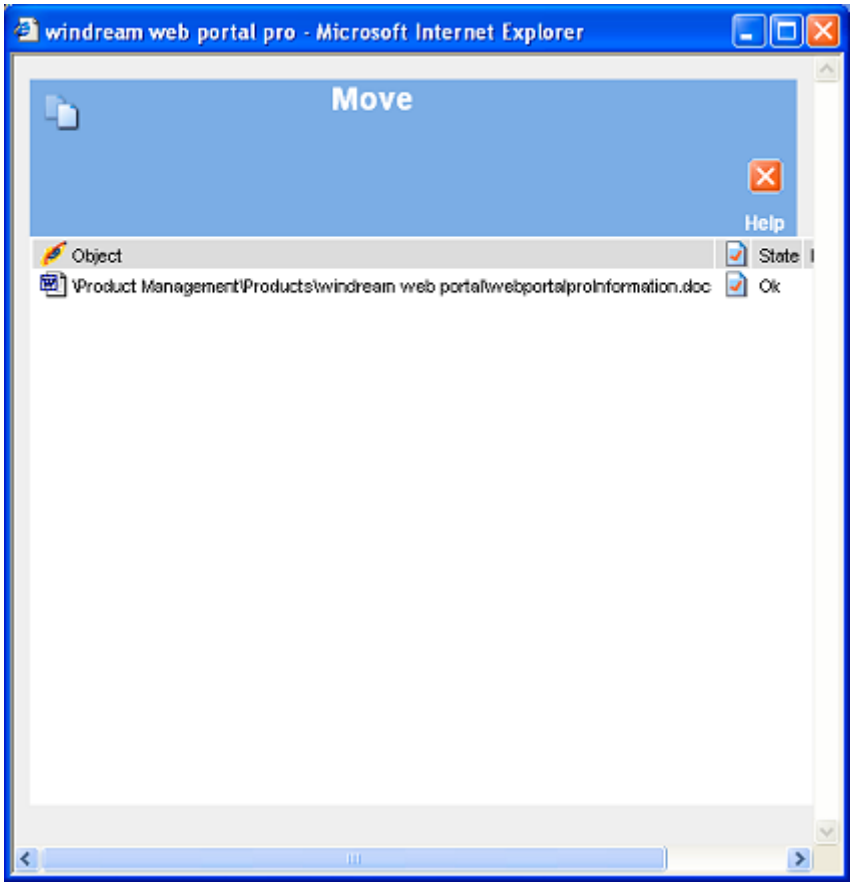

Figure 62: Moving objects - reporting

The process is logged in the report window. A line with the filename, the status, and an error description will be edited. If an error occurs with one of the objects to be processed, a respective message will be displayed in column *Error description*. The report window is closed via icon .

Via the properties icon in column you can view and edit the file properties, for example the indices or the access rights.

How to move a file / a folder

1. Select the objects to be moved in the Explorer listview or in a result list.
2. Click the *Move objects* button .
3. Select the target path in the *Move* window.
4. Click .
5. Enable the checkmark for replacing existing objects if existing objects shall be overwritten in the target directory.
6. Enable the option to include previous versions, if previous versions shall also be replaced.

7. Enable the option *With index data*, if indices shall also be moved.
8. Click icon in the Move window to move the files to the determined directory.
9. Close the report window by clicking .

Renaming objects

In order to rename an object, you select the desired object in the Explorer listview or in a result list and click the *Rename Object* icon. Enter the new name in the *Object* field. In order to be able to also rename documents which are read-only (file attribute has been set), you will have to enable the option to ignore the read-only flags.

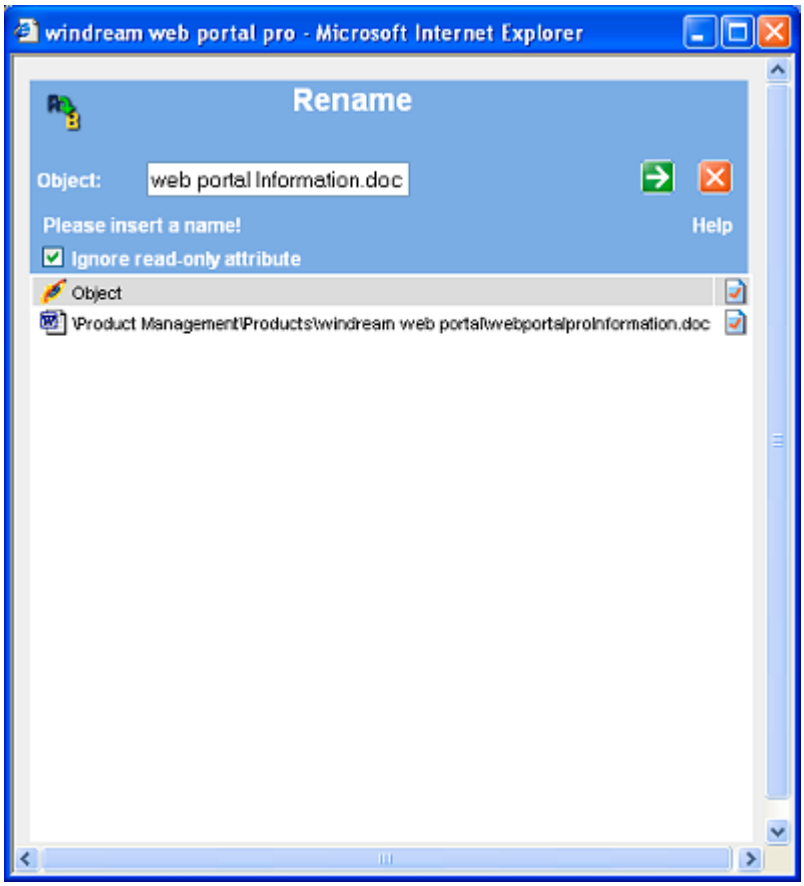

Figure 63: Renaming objects

You can edit or view the object properties via icon in column .

Click to rename the file.

The process is logged in the report window. A line with the filename, the status, and an error description will be edited. If an error occurs with one of the objects to be processed, a respective message will be

displayed in column *Error description*. You close the report window with a click on .

You can view and edit the object properties via icon in column .

How to rename a file / a folder

1. Select the object to be renamed in the Explorer listview or in a result list.
2. Click the *Rename* icon.
3. Enter the new name in the *Rename* window (field Object).
4. Check the box to ignore the read-only mode, if read-only documents shall also be renamed.
5. Click .
6. Close the report window via icon .

Deleting objects

In order to delete objects, you select the desired objects in the Explorer listview or in a result list and click the *Delete* icon .

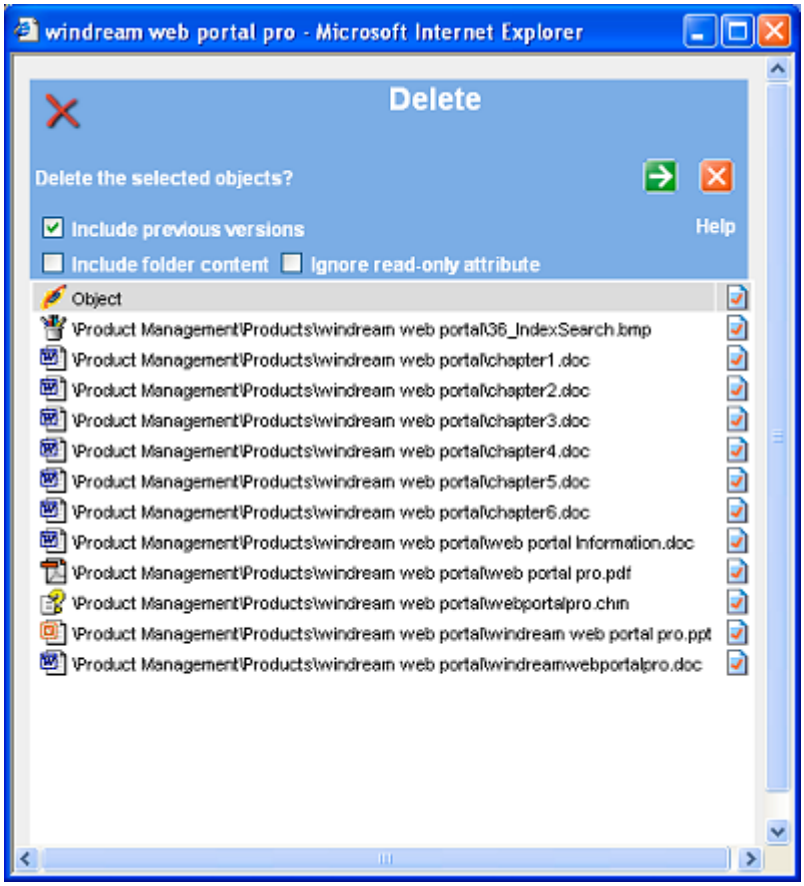
windream web portal pro - Microsoft Internet Explorer
Delete
Delete the selected objects?
Include previous versions
Help
Include folder content
Ignore read-only attribute
Object
\Product Management\Products\windream web portal\36_IndexSearch.bmp
\Product Management\Products\windream web portal\chapter1.doc
\Product Management\Products\windream web portal\chapter2.doc
\Product Management\Products\windream web portal\chapter3.doc
\Product Management\Products\windream web portal\chapter4.doc
\Product Management\Products\windream web portal\chapter5.doc
\Product Management\Products\windream web portal\chapter6.doc
\Product Management\Products\windream web portal\web portal Information.doc
\Product Management\Products\windream web portal\web portal pro.pdf
\Product Management\Products\windream web portal\webportal\pro.chm
\Product Management\Products\windream web portal\windream web portal pro.ppt
\Product Management\Products\windream web portal\windream\webportal\pro.doc

Figure 64: Deleting Objects

The selected objects are listed.

With the option to also include previous versions, previous versions will also be deleted. If you have select the option to include the contents of folders, the selected folders and the contained objects will be rmoved.

In order to be able to also delete read-only documents (file property set), you will have to enable the option for ignoring the read-only mode.

You can edit and view the object properties via icon *Properties* in column .

The objects displayed can be deleted via icon .

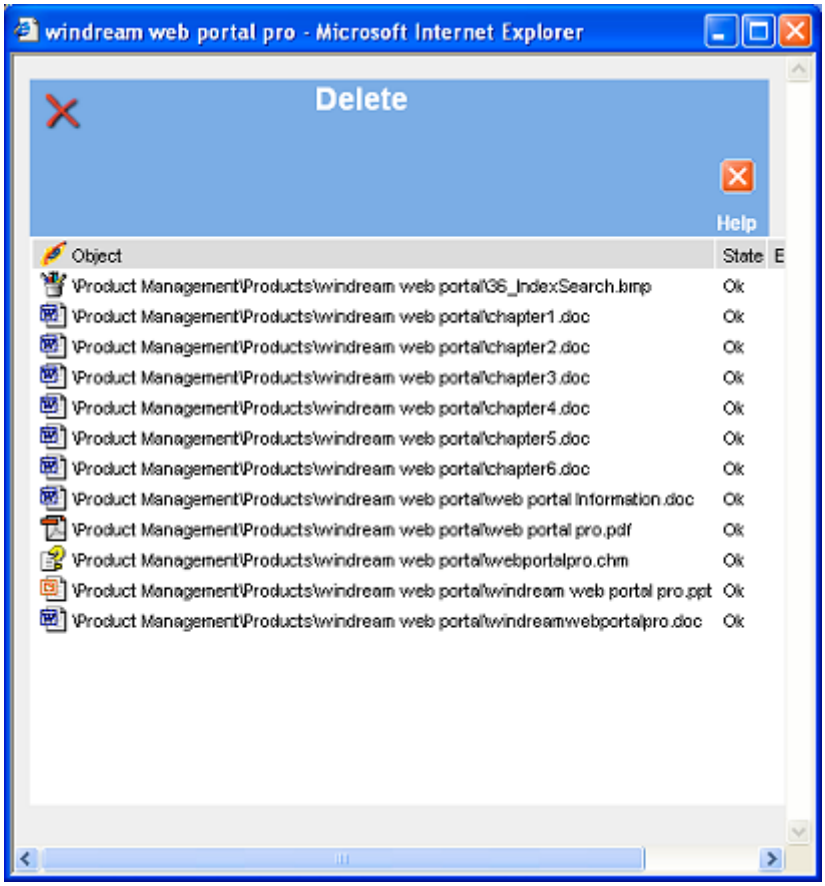
windream web portal pro - Microsoft Internet Explorer
Delete
Help
Object
State
\Product Management\Products\windream web portal\35_IndexSearch.bmp Ok
\Product Management\Products\windream web portal\chapter1.doc Ok
\Product Management\Products\windream web portal\chapter2.doc Ok
\Product Management\Products\windream web portal\chapter3.doc Ok
\Product Management\Products\windream web portal\chapter4.doc Ok
\Product Management\Products\windream web portal\chapter5.doc Ok
\Product Management\Products\windream web portal\chapter6.doc Ok
\Product Management\Products\windream web portal\web portal information.doc Ok
\Product Management\Products\windream web portal\web portal pro.pdf Ok
\Product Management\Products\windream web portal\webportalpro.chm Ok
\Product Management\Products\windream web portal\windream web portal pro.ppt Ok
\Product Management\Products\windream web portal\windreamwebportalpro.doc Ok

Figure 65: Deleting objects - reporting

The process is logged in the report window. A line with the filename, the status, and an error description will be edited. If an error occurs with one of the objects to be processed, a respective message will be displayed in column *Error description*. The report window is closed via icon .

How to delete a file / a folder

1. Select the objects to be deleted in the Explorer listview or in a result list.
2. Click the *Delete* icon .
3. In the *Delete* window, enable the option to *include previous versions* to also deleted the previous versions of the selected documents.
4. Enable the option to include folders, if selected folders incl. all contained objects shall be removed.
5. Check the box to ignore the read-only mode, if read-only files shall also be deleted.
6. Click in the *Delete* window to delete the selected objects.
7. Close the report window via icon .

Configuration

You can make personal settings in the **win**dream web portal pro configurations. Changed settings will only become effective after a renewed logon to **win**dream web portal pro.

Personal settings (windream web portal pro)

This site presents options for general and personal settings (for example version number of **win**dream web portal pro, the name of the **win**dream Server or the language version).

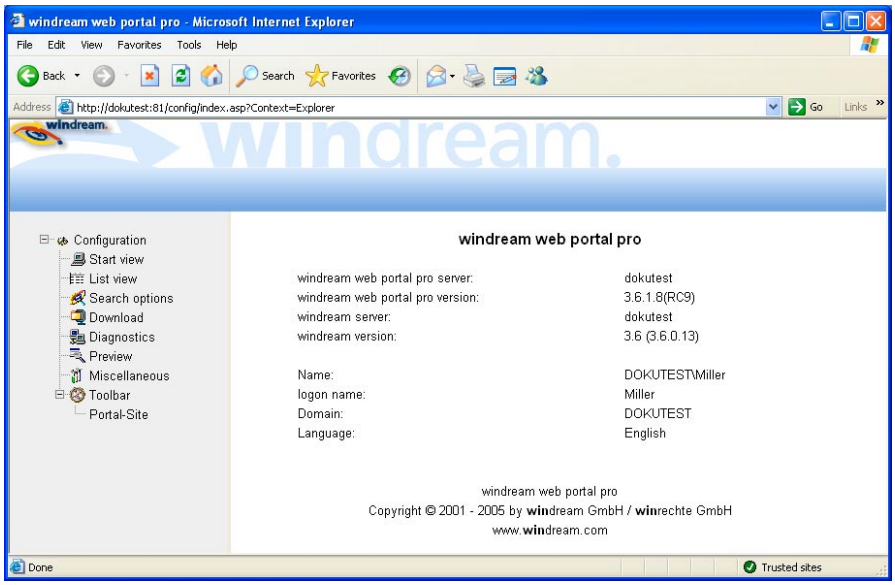

Figure 66: Configuration

Start view

Here, you select the site which is displayed after logon. Enable one of the possible views and confirm the changes with command button *Save*.

Changed settings will only become effective after a renewed logon to **win**dream.

In order to discard changes, you enable the *Reset* button.

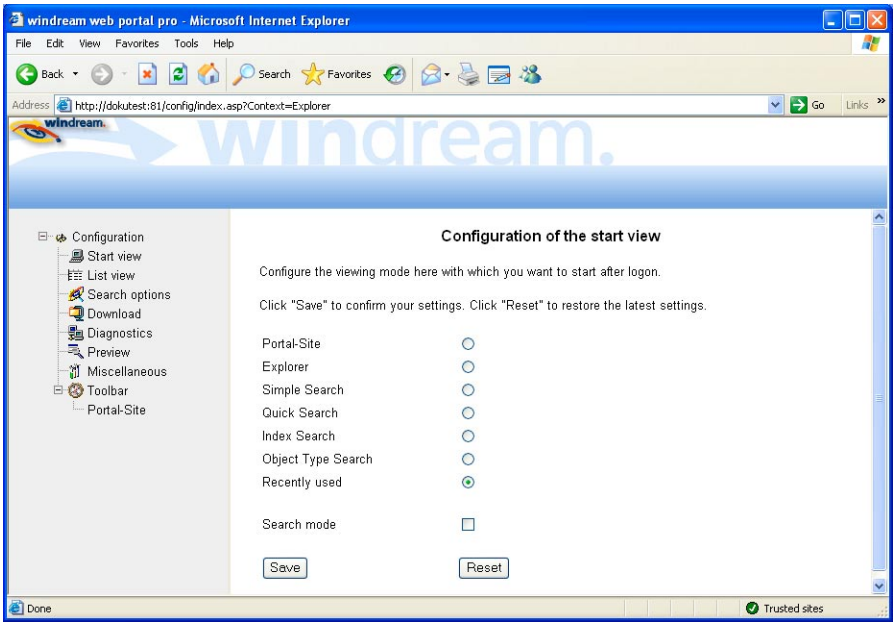

Figure 67: Configuration - Start view

Enable retrieval mode

If you have a full licence for **win**dream web portal pro, you can switch to the retrieval mode by enabling the respective checkmark. After having enabled this option and a renewed logon, you will only have access to the retrieval and Find functions of **win**dream web portal pro (see chapter "A survey", p. 1).

Listview

Here, you determine the type of presenting the result lists or the Explorer listview . You can also determine whether the listview will always be refreshed automatically or not after file operations. You can also determine the size of the thumbnails here.

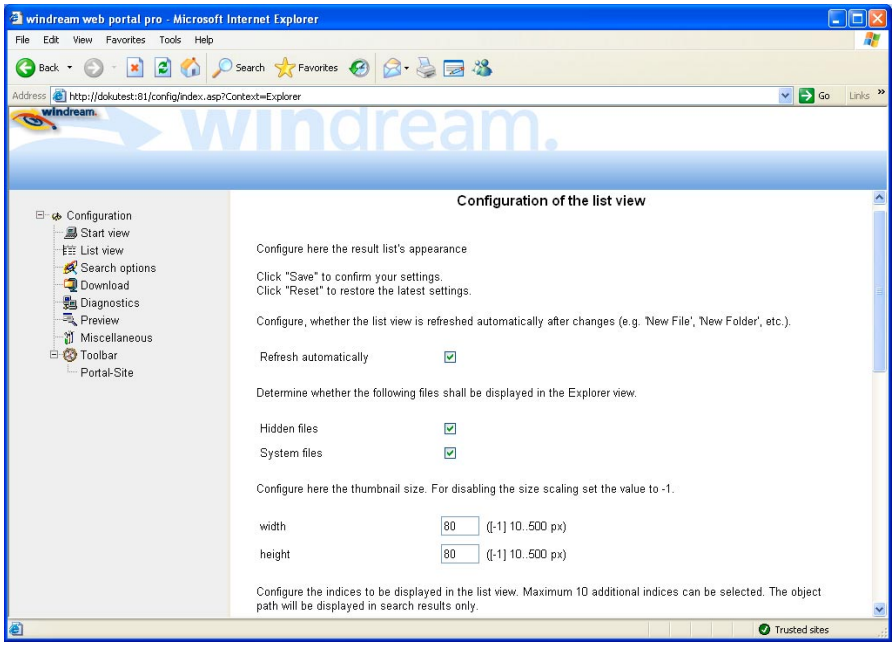
windream web portal pro - Microsoft Internet Explorer
File Edit View Favorites Tools Help
Back Search Favorites
Address http://dokutest:81/config/index.asp?Context=Explorer
Go Links
windream.
Configuration
Start view
List view
Search options
Download
Diagnostics
Preview
Miscellaneous
Toolbar
Portal-Site
Configuration of the list view
Configure here the result list's appearance
Click "Save" to confirm your settings.
Click "Reset" to restore the latest settings.
Configure, whether the list view is refreshed automatically after changes (e.g. 'New File', 'New Folder', etc.).
Refresh automatically
Determine whether the following files shall be displayed in the Explorer view.
Hidden files
System files
Configure here the thumbnail size. For disabling the size scaling set the value to -1.
width 80 ([-1] 10..500 px)
height 80 ([-1] 10..500 px)
Configure the indices to be displayed in the list view. Maximum 10 additional indices can be selected. The object path will be displayed in search results only.
Trusted sites

Figure 68: Configuration - List view

Show hidden files and system-specific files

Via the checkmarks named *Hidden files* and *System files* you determine whether files equipped with the respective attributes shall be displayed in the Explorer listview or not.

Refresh listview automatically

The checkmark for automatic refresh determines whether the list will automatically be refreshed after file operations. As default, the option is enabled.

> **Note:** Depending on the number of objects to be processed in a file operation, it may be useful to disable this option in order to increase performance.

Adjusting the presentation of the listview

On the one hand, specific default columns like *Filename*, *Save as* , *Properties* , *Preview* or *Fulltext* are displayed in the Explorer listview or in the result lists. You can determine the columns to be displayed, however, certain views will not be available in the listview.

In addition to these columns, you can determine up to ten further columns (indices). The indices selected from the dropdown list boxes (*1* to *10*) are presented in the order of the selection fields listed there. In order to remove a column from the listview, you select the first (empty) entry from the list box.

With the entry for the thumbnails, you configure a column in which the thumbnails of documents are displayed.

Note: If you select the `Object Path` index as a column, this column will only be displayed in a result list, but not in the Explorer listview.

If you select entry `Thumbnail` for a column, please note that the thumbnails can only be viewed with documents for which thumbnails have been created. The generation is executed on the **win**dream Server by a system administrator.

Configuring thumbnail view and adjusting the presentation of thumbnails

If you want to configure the thumbnail view in the Explorer listview and in the result lists, you will have to select the column in which the thumbnails shall be displayed (dropdown listboxes *1* to *10*). Then, you select entry `Thumbnail` from the list. Determine the size (width and height) of the thumbnails and save the settings.

Note: Please note that the thumbnail view can only be executed for documents, for which thumbnails have been created. The generation is executed on a **win**dream Server by a system administrator.

How to determine the presentation of the result list or the Explorer listview

1. Click the *configuration* icon of **win**dream web portal pro.
2. Open the *Listview* folder.
3. Select the index properties which shall be presented from the dropdown list boxes.
4. Enable the checkboxes for the default dcolumns which shall be displayed in the Explorer listview and in the result lists.
5. Enable the *Save* button at the bottom of the list to save the changes.

The result lists and the Explorer listview will be presented as determined.

In order to discard changes and to reset input fields, you enable the *Reset* button at the bottom of the list. The previously determined settings will be restored.

Search options

The search options offer additional options for specifying a retrieval. The current settings are valid for all search operations. In addition to this, specific options can be determined in the search functions, which

will then exclusively be valid for the current search (see chapter "Editing the options of the current search", p. 15).

Changes can be saved by clicking the *Save* button.

In order to discard changes and to reset input fields, you enable the *Reset* button at the bottom of the list. The previously determined settings will be restored.

Note: When storing search profiles, specific search options will also be saved as properties of the search profile (see chapter "Working with search profiles ", p. 28). If no specific options have been determined, the globally determined search options will be valid here.

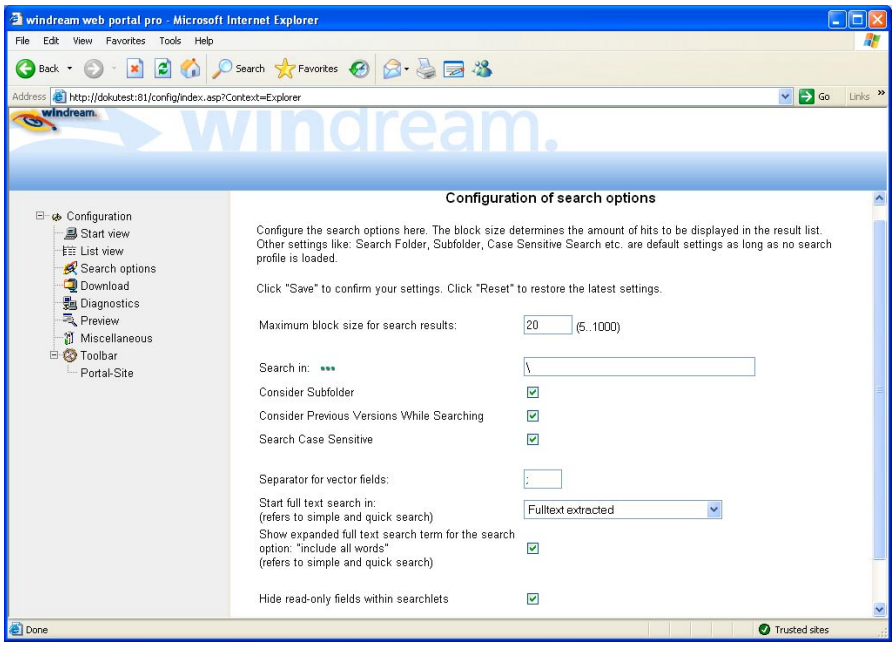
windream web portal pro - Microsoft Internet Explorer
File Edit View Favorites Tools Help
Back Search Favorites
Address http://dokutest:81/config/index.asp?Context=Explorer
Go Links
windream.
Configuration
Start view
List view
Search options
Download
Diagnostics
Preview
Miscellaneous
Toolbar
Portal-Site
Configuration of search options
Configure the search options here. The block size determines the amount of hits to be displayed in the result list. Other settings like: Search Folder, Subfolder, Case Sensitive Search etc. are default settings as long as no search profile is loaded.
Click "Save" to confirm your settings. Click "Reset" to restore the latest settings.
Maximum block size for search results:
20
(5..1000)
Search in:
\
Consider Subfolder
Consider Previous Versions While Searching
Search Case Sensitive
Separator for vector fields:
;
Start full text search in:
(refers to simple and quick search)
Fulltext extracted
Show expanded full text search term for the search option: "include all words"
(refers to simple and quick search)
Hide read-only fields within searchlets
Done
Trusted sites

Figure 69: Configuration - Search options

Maximum blocksize for search results

Here, you determine the blocksize, or respectively the number of objects to be loaded into the Explorer listview and into the result lists. The number of objects in a block corresponds to the number which is determined under *Search options>Maximum Blocksize for search results*. This number also determines the number of objects to be loaded after having clicked the command button for viewing the next block of hits.

Searching objects recursively from a specific folder

Via command button ... you can determine a folder as the starting point of a search process. The folder determined here will then be displayed on the search options site. Here, you can also determine here that subfolders will be included in a search process (checkmark enabled). As default, this option is enabled.

Further options

You can also enable or disable the checkmarks for considering case sensitive search and for including previous versions in a search.

Field separators for vector fields

When conducting a search via the contents of vector fields in the index search , several values separated by field separators will be entered as search criterion. As default, the semicolon is used. You can determine another separator here. All characters and strings up to 3 characters are possible.

Start fulltext search in

In the simple search and in the quick search , documents will be found according to fulltext search routines. Thus, you determine the fulltext to be searched in via dropdown listbox *In*. With option *Start fulltext search*, you set the fulltext which shall be used as default.

Viewing the extended fulltext search term

This option determines whether the extended fulltext search expression is displayed in the simple search and in the quick search or not. By default, search expressions entered will be connected with operator "OR" in search queries of the simple and the quick search, if a fulltext search is executed. In order to find documents which contain all search expressions, the items can also be connected with operator "AND". For this, **win**dream web portal pro offers the option named *Include all words*. If this option has been switched on, **win**dream will extend the search term in the *Find* field automatically and will display the extended expression, if the option for viewing the extended fulltext search expression has been switched on.

Hide non-editable fields in searchlets

Enable this option, if only those fields shall be displayed in searchlets (=search profile created with the index search), into which search expressions must be entered (see chapter "windream searchlets", p. 111).

How to determine the blocksize for viewing objects from a result list

1. Click the *configuration* icon of **win**dream web portal pro.
2. Open folder *Search options*.
3. Enter the desired blocksize in field *Maximum blocksize for search results*.
4. Enable the *Save* button to save the changes.

How to determine a folder as starting point of a search

1. Click the *configuration* icon of **win**dream web portal pro.
2. Open folder *Search options*.
3. Enable command button *Search in* .
4. Select the desired folder in window *Search in*.
5. Confirm the selection with .
6. In the window of the search configuration, you disable the checkmark for including subfolders, if subfolders shall not be considered.
7. Enable the *Save* button to save the changes.

The selected folder will be displayed on the search options site after a refresh.

Include previous versions

This checkmark determines whether previous document versions are to be included in a search or not. This option is disabled as default.

Consider case sensitive search

This checkmark determines whether small and capital letters will be considered separately in a search process. This refers to the simple search, the quick search, the index search, and the object type search.

When searching in the fulltext of documents, there will be no differentiation between small and capital letters. This is also valid when searching documents according to filenames (also in 8.3 format).

As default, this option is disabled.

Download

When downloading several objects, the selected files and folders will be collected in a download ZIP-file. The respective configuration is determined on this site. Changes are saved by clicking the respective button.

Enable the reset button to discard changes.

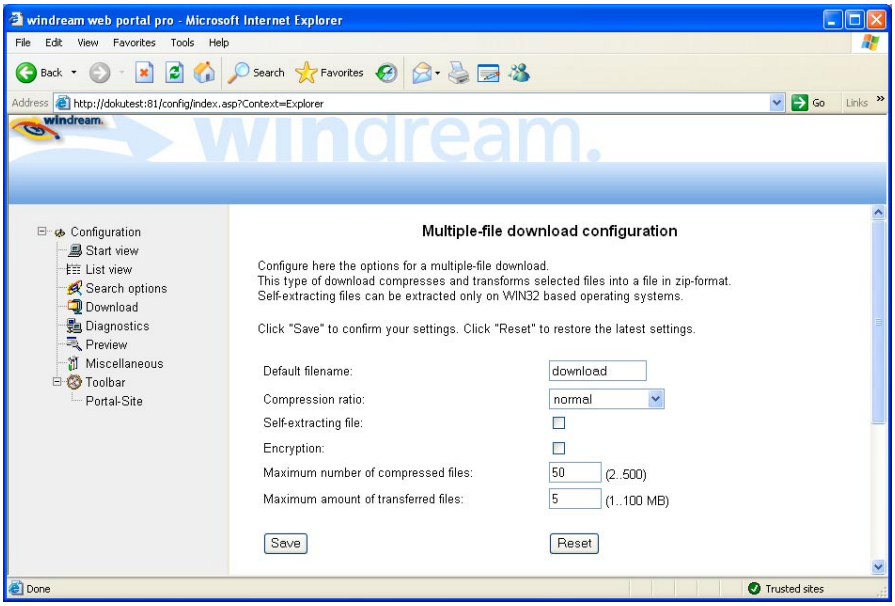

Figure 70: Configuration - Download

Default filename

Enter the filename here, with which the file will be downloaded to the determined directory (default: `download`). This name will only be used if several files / folders are selected for a download. If you select only one folder, the name of this folder will be used as default.

Options for compression (ratio)

The compression ratio is determined via the respective dropdown list box. You can also determine whether the file shall be created as self-extracting EXE-file (enable checkmark). Enable *Encryption* to encrypt the file before downloading it.

Maximum number of compressed files

This option will restrict the number of files. Up to 100 files can be collected in a download (ZIP) file. If the current number exceeds the maximum, only the first 100 files will be included in the download process.

windream web portal pro will then generate a logfile which lists the files that have been collected and those that could not be considered. The logfile is created in XML-format and saved within the download file. The filename starts with three exclamation marks (!!!). Up to 100 entries will be generated.

Maximum amount of transferred files

This option restricts the filesize of files to be compressed. The ZIP-file will collect files until the maximum number determined here is reached.

If, due to the volume limit, not all selected files could be collected in the ZIP-file, **win**dream web portal pro will generate a logfile which lists the collected files and those that could not be included. The logfile is

created in XML-format and saved within the ZIP-file. The filename starts with three exclamation marks (!!!). Up to 100 entries will be generated.

Diagnostics

This site presents general information on the current system configuration.

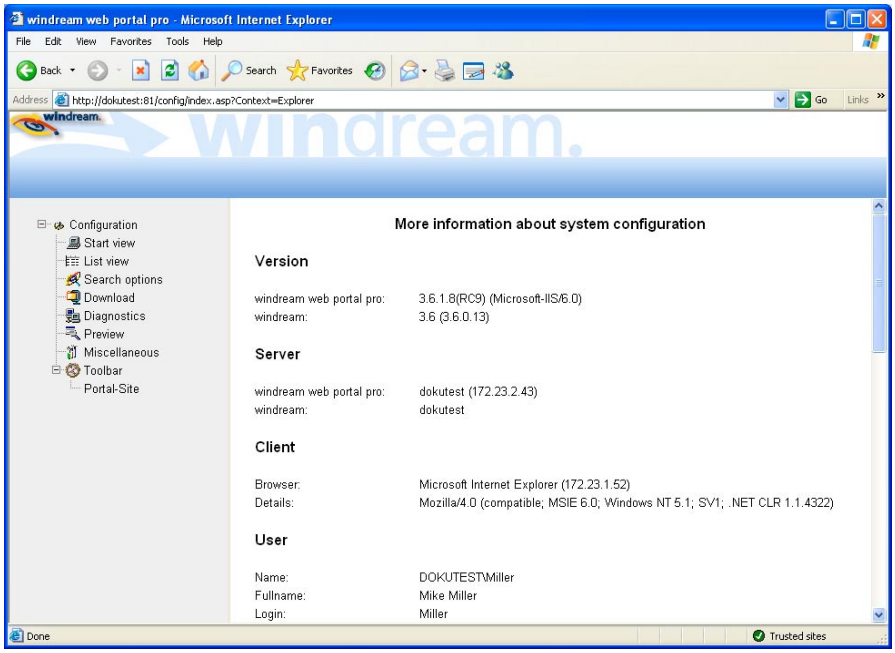

Figure 71: Configuration - Diagnostics

Preview

On this page, you set the format of image files for the presentation in the HTML preview.

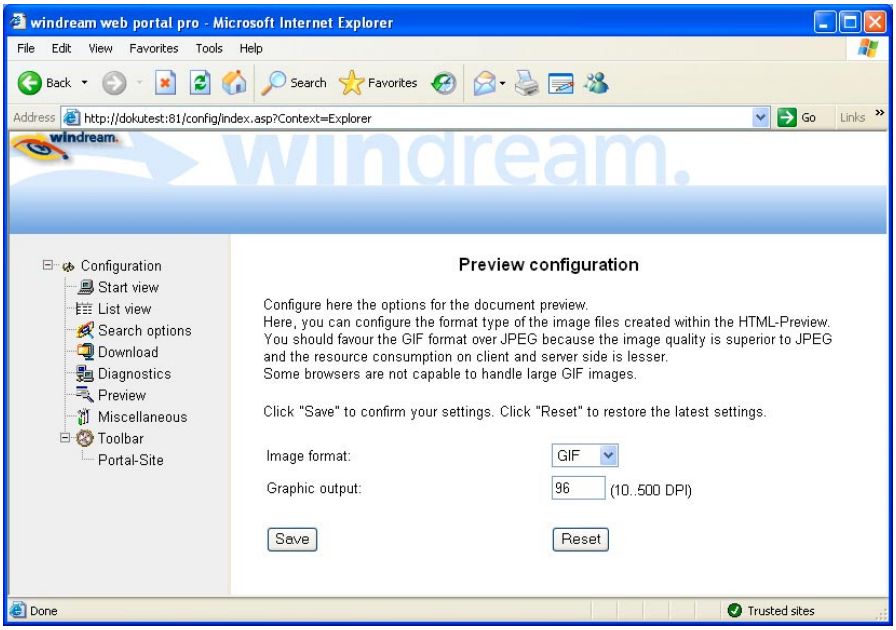
windream web portal pro - Microsoft Internet Explorer
File Edit View Favorites Tools Help
Back Search Favorites
Address http://dokutest:81/config/index.asp?Context=Explorer
Go Links
windream.
Configuration
Start view
List view
Search options
Download
Diagnostics
Preview
Miscellaneous
Toolbar
Portal-Site
Preview configuration
Configure here the options for the document preview.
Here, you can configure the format type of the image files created within the HTML-Preview.
You should favour the GIF format over JPEG because the image quality is superior to JPEG and the resource consumption on client and server side is lesser.
Some browsers are not capable to handle large GIF images.
Click "Save" to confirm your settings. Click "Reset" to restore the latest settings.
Image format:
GIF
Graphic output:
96
(10..500 DPI)
Save
Reset
Done
Trusted sites

Figure 72: Configuration - Preview

Miscellaneous

Here, further settings are offered for the user-specific configuration of **win**dream web portal pro. Changes on the settings can be saved via the *Save* button.

In order to undo the changes and to restore the previous settings again, click the *Reset* button.

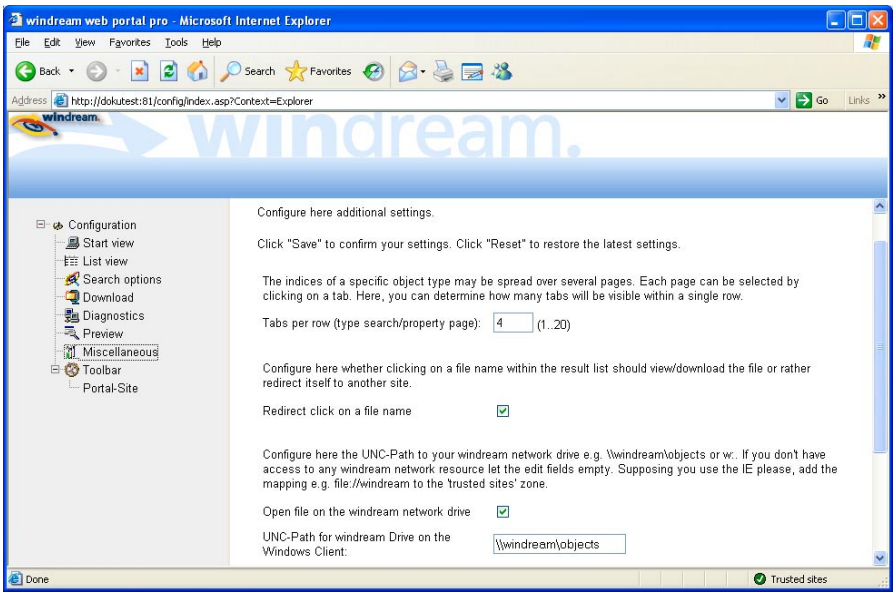
windream web portal pro - Microsoft Internet Explorer
File Edit View Favorites Tools Help
Back Search Favorites
Address http://dokutest:81/config/index.asp?Context=Explorer
Go Links
windream.
Configuration
Start view
List view
Search options
Download
Diagnostics
Preview
Miscellaneous
Toolbar
Portal-Site
Configure here additional settings.
Click "Save" to confirm your settings. Click "Reset" to restore the latest settings.
The indices of a specific object type may be spread over several pages. Each page can be selected by clicking on a tab. Here, you can determine how many tabs will be visible within a single row.
Tabs per row (type search/property page):
4
(1..20)
Configure here whether clicking on a file name within the result list should view/download the file or rather redirect itself to another site.
Redirect click on a file name
Configure here the UNC-Path to your windream network drive e.g. \\windream\objects or w:. If you don't have access to any windream network resource let the edit fields empty. Supposing you use the IE please, add the mapping e.g. file://windream to the 'trusted sites' zone.
Open file on the windream network drive
UNC-Path for windream Drive on the Windows Client:
\\windream\objects
Done
Trusted sites

Figure 73: Configuration - Miscellaneous

Number of tabs per line

The index properties on tab page *Indices* of the object properties or in the object type search can be placed on several tab pages. The number of tabs per line can be determined here.

Redirect click to filename

By default, a file will be opened and viewed in a browser window with a click on the filename. However, it is possible to redirect the click to the filename, meaning that the file is opened in a specific user-defined window. This way, user-specific events can e.g. be executed for specific filetypes (e.g. for viewing in special viewers).

Open file on the windream network drive

If you access the **win**dream network drive via the Internet, you can also open the documents there directly with the associated original application and edit them. In order to be able to do this, you must enable the option for redirecting the click to filename and determine how you have connected the **win**dream drive (UNC-path).

UNC-path to windream drive

Via the UNC-path (Universal Naming Convention) you can directly access the **win**dream drive. Depending on the operating system, enter the mode here with which you have mapped the drive.

Set scheme

Here, you can determine the look of **win**dream web portal pro by selecting a scheme. Select a scheme from the list to open the desired design.

Toolbar

Here, you configure the navigation bar of **win**dream web portal pro. For example, you can enable the context menu here via which further user-specific functions for processing objects can be launched.

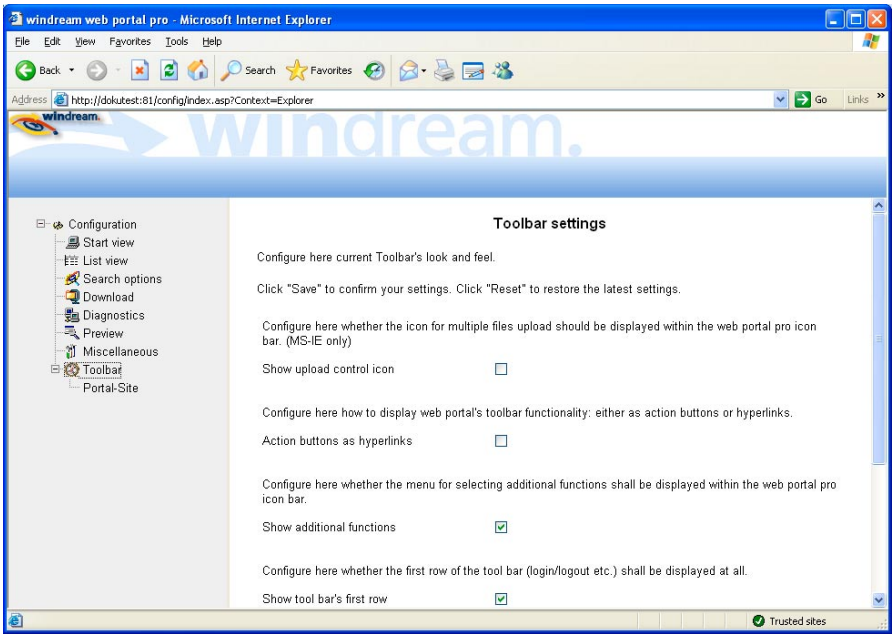
windream web portal pro - Microsoft Internet Explorer
File Edit View Favorites Tools Help
Back Search Favorites
Address http://dokutest:81/config/index.asp?Context=Explorer
Go Links
windream.
Configuration
Start view
List view
Search options
Download
Diagnostics
Preview
Miscellaneous
Toolbar
Portal-Site
Toolbar settings
Configure here current Toolbar's look and feel.
Click "Save" to confirm your settings. Click "Reset" to restore the latest settings.
Configure here whether the icon for multiple files upload should be displayed within the web portal pro icon bar. (MS-IE only)
Show upload control icon
Configure here how to display web portal's toolbar functionality: either as action buttons or hyperlinks.
Action buttons as hyperlinks
Configure here whether the menu for selecting additional functions shall be displayed within the web portal pro icon bar.
Show additional functions
Configure here whether the first row of the tool bar (login/logout etc.) shall be displayed at all.
Show tool bar's first row
Trusted sites

Figure 74: Configuration - Toolbar

Show upload control (Microsoft Internet Explorer only)

If this option is switched on, the upload icon will be displayed in the navigation bar (see chapter "Upload via the *Upload* icon", p. 52).

Show buttons as Hyperlinks

This option will present the icons of the menu bar as hyperlinks.

Show first line of menu bar

Enable this option to view the first line of the menu bar (icons *Configuration*, *Logon/logoff* and *Help*, default setting. If you disable this option, the first line will be hidden and the icons *Configuration*, *Logon / Logoff* and *Help* will be displayed in the second line.

Show further functions

By enabling this option, a dropdown list will be added to the navigation bar of **win**dream web portal pro. the list contains a selection of additional functions for editing documents and folders. With these functions, further file operations for selected objects can be executed from the Explorer listview or from a result list. The type and the integration of possible functions is user- or customer-specific. Depending on the requirements, respective functions can for example be programmed as scripts and integrated in the list of additional functions.

Please contact **win**dream GmbH or your **win**dream partner for further information (www.windream.com).

Configuration of dropdown list "Further functions "

All find and editing functions which are usually launched via the icons or via hyperlinks from the menu bar can also be started via the

respective commands from the dropdown list. Thus, configure the dropdown list by highlighting the options for viewing the main functions, find functions or editing functions. The commands are listed in the dropdown list, and the respective icons are hidden from the menu bar. The entries of the standard functions are highlighted in the list by colors.

Integration of new functions (script)

The following steps are required to integrate a new function into the application:

- Creating the script.
- Adjusting CSV-file `WMOW2CP.csv`.
- Adjusting XML-file `Context-Menu.xml`.

Note: Only functions are possible which execute operations on selected objects in the Explorer listview or from the result list. The design and programming of scripts for further functions depends on the requirements and requires a specific know-how. The description of the tools required for developing scripts (for example VB script) is not part of this documentation.

Creating a script

The scripts are expected as `ASP`-files in the `Explorer` directory within the installation directory of **win**dream web portal pro. You will also find an example script there (`Sample.asp`).

After having created a script, you adjust the files named `Context-Menu.xml` and `WMOW2CP.csv` to integrate the new function into the application.

Example

Example-script `Sample.asp`:

```
<%@ LANGUAGE="VBScript" %>
<!doctype html public "-//W3C//DTD HTML 3.2//EN">
<html>
<head>
      <meta http-equiv="CONTENT-TYPE" content="text/html; charset=iso-
8859-1">
      <meta http-equiv="EXPIRES" content="0">
      <link rel=stylesheet type="text/css" href="../style.css">
      <%=WMW2P_COPYRIGHT%>

      <title><%=WMW2P_NAME%></title>
</head>

<body class='Func'>
```

```
<%
          Const REPLACE_TOKEN4_QUOTATION_MARK     = "%27"

    Set aGlobalW2pObj = Session("WMMainObjectKey")
    Set aWMSession = aGlobalW2pObj("WMSession")

          Response.Write( "<b>Selected Objects:</b>" )
          Response.Write( "<br><br>" )
          Response.Write( "<table>" )

          nCount = 0
          for each entry in request.form
               if Len(entry) > 3 And Left(entry,3) = "cb_" And
request.form(entry) = "on" then
                    sForm = replace(entry, "cb_", "path_")
                    sPath = Replace( request.form(sForm),
REPLACE_TOKEN4_QUOTATION_MARK, "'", 1, -1, 0 )

                    set aPDObject = aWMSession.GetWMObjectByPath( 0, sPath
)

                    Response.Write( "<tr>" )

                    Response.Write( "<td>" )
                    if aPDObject.aWMEntity = 1 then
                         Response.Write( "File" )
                    else
                         Response.Write( "Folder" )
                    end if
                    Response.Write( "</td>" )

                    Response.Write( "<td>" )
                    Response.Write( aPDObject.aPath )
                    Response.Write( "</td>" )

                    Response.Write( "</tr>" )

                    nCount = nCount + 1
               end if
          next
          Response.Write( "</table>" )

          if nCount = 0 then
               response.write( "Nothing selected<br><br>" )
          end if
%>
</body>
</html>
```

End of example

Adjusting XML-file `Context-Menü.xml`

The script is integrated in the list of further functions with an additional entry in file `Context-Menu.xml`. The file will has been installed in the **win**dream web portal pro installation folder during the installation of the program. Open the file with an editor and add an

entry like **<ContextMenuEntry> Scriptname </ContextMenuEntry>**. The functions will be displayed in the **win**dream web portal pro list as entered here and with the respective sorting.

Example

Entry for a new script `SampleNew.asp`:

```
<?xml version="1.0" encoding="iso-8859-1"?>
<W2pContextMenuConfiguration>
   <ContextMenuEntry>Sample</ContextMenuEntry>
   <ContextMenuEntry>SampleNew</ContextMenuEntry>
</W2pContextMenuConfiguration>
```

End of example

Adjusting CSV-file `WMOW2CP.csv`

In file `WMOW2CP.csv`, you determine the designator with which the script shall occur in the list of functions. The file will be installed in folder NLS of the installation directory when installing the program. Open the file with an editor and add an entry like **`TxtScriptname=;Example_New;Sample_New`** in section `[ContextMenu]`. The entry consists of the Txt token.

Example

Entry for a new script named `SampleNew.asp`:

```
...
[ContextMenu];;
TxtSample=;Example;Sample
TxtSampleNew=;Example_New;Sample_New
...
```

End of example

Portal site – navigation bar

Here, you configure the navigation bar of the user-specific portal site. The available settings correspond to the options of the same name which are available on the configuration site of the navigation bar of **win**dream web portal. For example, you can activate and enable the dropdown list for further functions here, too. The description of the respective settings can be found in chapter "Toolbar", p. 105.

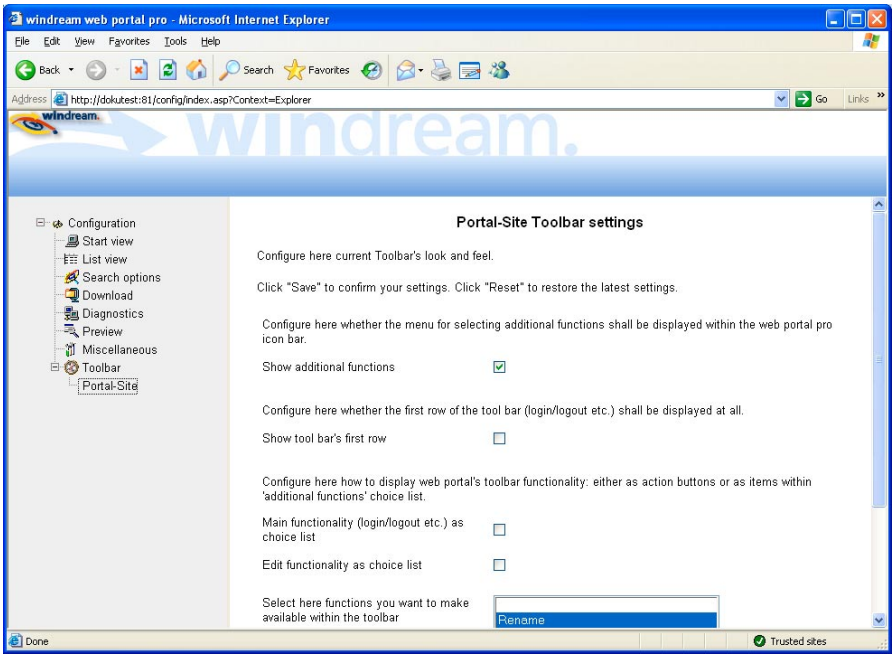
windream web portal pro - Microsoft Internet Explorer
File Edit View Favorites Tools Help
Back Search Favorites
Address http://dokutest:81/config/index.asp?Context=Explorer
Go Links
windream.
Configuration
Start view
List view
Search options
Download
Diagnostics
Preview
Miscellaneous
Toolbar
Portal-Site
Portal-Site Toolbar settings
Configure here current Toolbar's look and feel.
Click "Save" to confirm your settings. Click "Reset" to restore the latest settings.
Configure here whether the menu for selecting additional functions shall be displayed within the web portal pro icon bar.
Show additional functions
Configure here whether the first row of the tool bar (login/logout etc.) shall be displayed at all.
Show tool bar's first row
Configure here how to display web portal's toolbar functionality: either as action buttons or as items within 'additional functions' choice list.
Main functionality (login/logout etc.) as choice list
Edit functionality as choice list
Select here functions you want to make available within the toolbar
Rename
Done
Trusted sites

Figure 75: Configuration - Navigation bar of the portal site

The Portal Site

The portal site is opened by a click on the logo in the title bar (first line of the menu bar) of **win**dream web portal pro. Another click will bring you back to the site from which you launched the portal site.

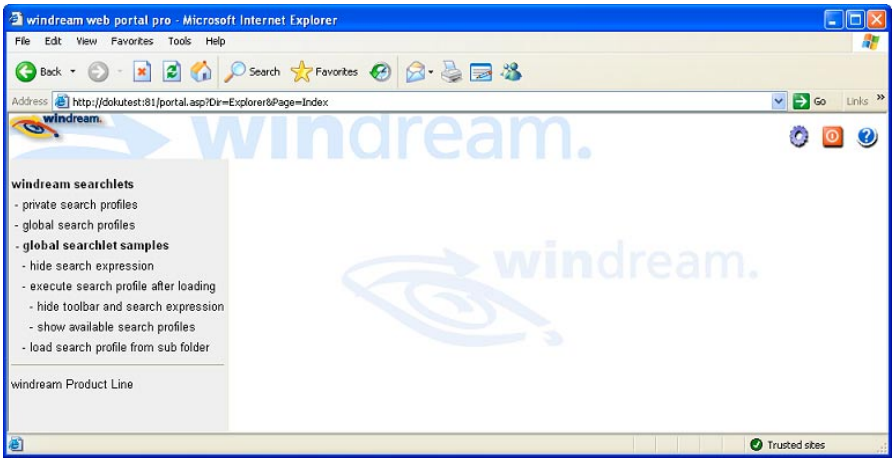
windream web portal pro - Microsoft Internet Explorer
File Edit View Favorites Tools Help
Back Search Favorites
Address http://dokutest:81/portal.asp?Dir=Explorer&Page=Index
Go Links
windream.
windream searchlets
- private search profiles
- global search profiles
- global searchlet samples
- hide search expression
- execute search profile after loading
- hide toolbar and search expression
- show available search profiles
- load search profile from sub folder
windream Product Line
Trusted sites

Figure 76: Portal site

If you have configured the navigation bar in a way that the first line of the menu bar is hidden, switch between **win**dream web portal and the portal site via the *portal site* icon or *windream Web Client* .

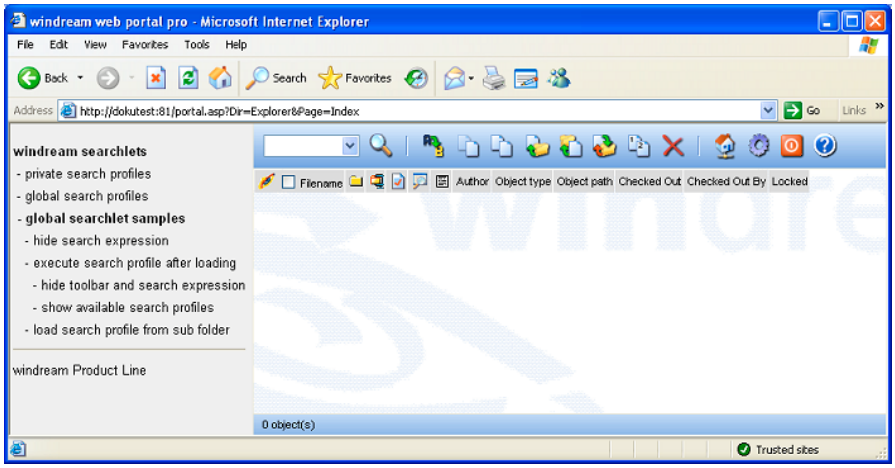
windream web portal pro - Microsoft Internet Explorer
File Edit View Favorites Tools Help
Back Search Favorites
Address http://dokutest:81/portal.asp?Dir=Explorer&Page=Index
Go Links
windream searchlets
- private search profiles
- global search profiles
- global searchlet samples
- hide search expression
- execute search profile after loading
- hide toolbar and search expression
- show available search profiles
- load search profile from sub folder
windream Product Line
Filename Author Object type Object path Checked Out Checked Out By Locked
0 object(s)
Trusted sites

Figure 77: Portal site without first line of the menu bar

The portal site can be designed individually as your personal web portal (for example by placing links on search engines or by integrating your personal website). The required configurations for the design are executed by a system administrator.

You can implement a global portal site for all users or a personal site for single users, which will then be displayed instead of the global site. You can implement any Internet or Intranet sites and **win**dream searchlets (**win**dream search profiles).

The navigation bar via which the functions available on the portal site are started can be configured in the **win**dream web portal configuration (see chapter "Portal site – navigation bar", p. 109).

windream **searchlets**

A **win**dream searchlet displays a search profile which has been created with the index search of **win**dream. In this case, object type, brackets, operators, and links cannot be edited any more. Search expressions can be entered in case the respective index fields have not been filled with values yet. While determining the search options, you can set in the configuration that exclusively those fields of the search profile shall be displayed in which search expressions can be entered (option for hiding editable fields within searchlets in chapter "Search options", p. 98.

windream searchlets can display private search profiles of the current user or public (global) profiles. It is possible to implement searchlets with or without determining a search profile in the portal site. A search profile can be implemented in a way that the respective search routine will be launched automatically after having called the searchlet directly.

The integration as well as the necessary configurations for the implementation of searchlets are executed by the responsible system administrator. By default, those searchlets are available on the portal site which can be launched via the links named `private`

`searchlets`, `global searchlets` and the examples for global search profiles.

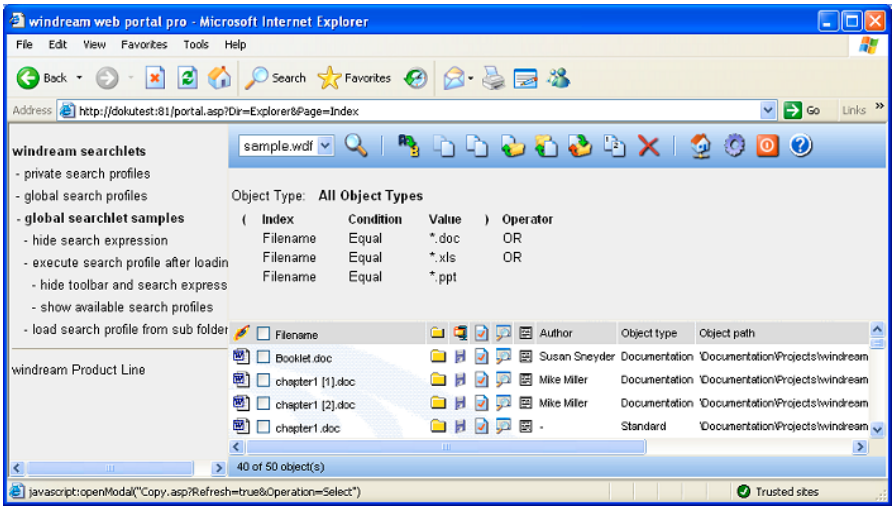
windream web portal pro - Microsoft Internet Explorer
File Edit View Favorites Tools Help
Back Search Favorites
Address http://dokutest:81/portal.asp?Dir=Explorer&Page=Index
Go Links
windream searchlets
- private search profiles
- global search profiles
- global searchlet samples
- hide search expression
- execute search profile after loadin
- hide toolbar and search express
- show available search profiles
- load search profile from sub folder
windream Product Line
sample.wdf
Object Type: All Object Types
(Index Condition Value) Operator
Filename Equal *.doc OR
Filename Equal *.xls OR
Filename Equal *.ppt
Filename Author Object type Object path
Booklet.doc Susan Sneyder Documentation \Documentation\Projects\windream
chapter1 [1].doc Mike Miller Documentation \Documentation\Projects\windream
chapter1 [2].doc Mike Miller Documentation \Documentation\Projects\windream
chapter1.doc Standard \Documentation\Projects\windream
40 of 50 object(s)
javascript:openModal("Copy.asp?Refresh=true&Operation=Select")
Trusted sites

Figure 78: windream searchlet with a global search profile

windream searchlets without determination of search profile

The searchlet displays a dropdown list box which contains the available search profiles. These are either the profiles of the current user (`private search profiles`) or the public search profiles (`global search profiles`).

After having selected a profile you conduct the search process by clicking . If search profiles have not been filled with values yet, you will have to enter the desired search expression before starting the process.

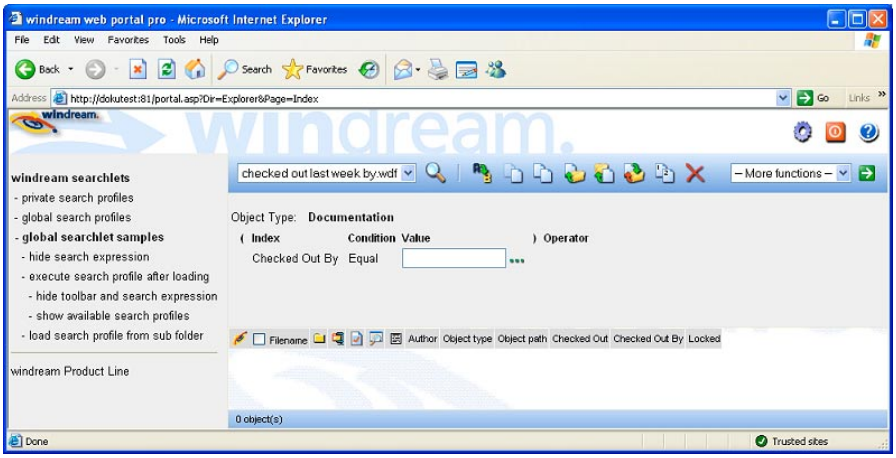
windream web portal pro - Microsoft Internet Explorer
File Edit View Favorites Tools Help
Back Search Favorites
Address http://dokutest:81/portal.asp?Dir=Explorer&Page=Index
Go Links
windream.
windream searchlets
- private search profiles
- global search profiles
- global searchlet samples
- hide search expression
- execute search profile after loading
- hide toolbar and search expression
- show available search profiles
- load search profile from sub folder
windream Product Line
checked out last week by.wdf
-- More functions --
Object Type: Documentation
(Index Condition Value) Operator
Checked Out By Equal
Filename Author Object type Object path Checked Out Checked Out By Locked
0 object(s)
Done
Trusted sites

Figure 79: **win**dream searchlet with a private search profile

The objects found will be listed in the result list, and they can be edited with the functions available.

windream **searchlets with determination of a search profile**

windream searchlets can be used with the determination of a search profile in the portal site. These are public profiles. The profiles are stored in a globally available directory of the Webserver and are thus available for all users in a company. This directory may also contain user-specific profiles (profiles of the current user or others), which have been placed there by a system administrator.

A searchlet for which a specific search profile has been determined will load this profile automatically. The user cannot select another profile.

The search is started by a click on the search button , if the search is not started automatically after having opened the search profile.

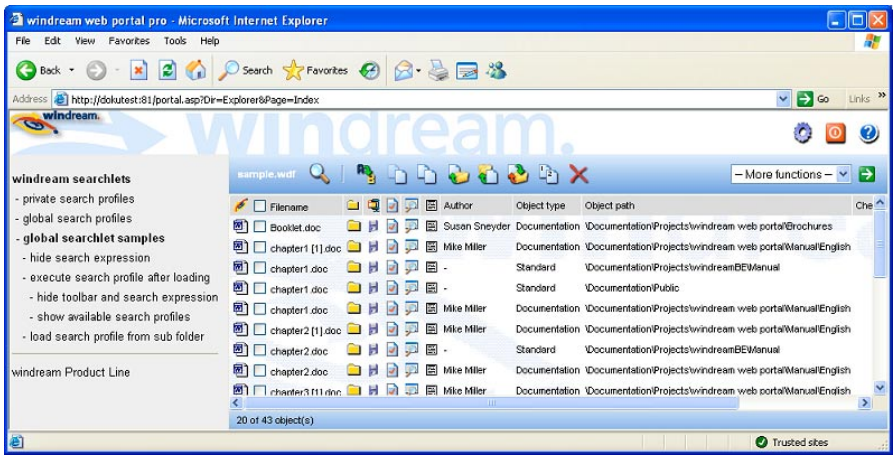

Figure 80: **win**dream searchlet with a global search profile and automatically executed search.

The objects found will be listed in the result list, and they can be edited with the functions available.

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